

# ProjectWise Explorer User Guide

# The New Line Copenhagen - Ringsted

1. January 2015

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#### 1 General

ProjectWise is a document management system used for project collaboration for The New Line Copenhagen – Ringsted and is the place to store all CAD files. In this guide all types of files is named: **documents**.

Sections that need special attention are marked with the symbol:



Issues regarding user creation and access rights must be addressed to:

Lone Skaaning Banedanmark Den nye bane København-Ringsted LSKB@bane.dk +45 4187 9986

The reasons to use ProjectWise for storing documents in the project are:

- Always to find the newest version of the document.
- All old versions of a document are saved for historical reasons.
- All stakeholders in the project can access documents.
- There will never be 2 documents with the same name which makes it easy to find a given document.
- The documents (CAD files) will retain the references.

### 2 Installing

For installing ProjectWise Explorer, see guide provided with the installation files.

### 3 Starting

ProjectWise is started by selecting the entry: **ProjectWise Explorer** from Windows **start** menu→Bentley→ProjectWise V8i (SELECTseries 4).

When starting the application for the first time you will see this screen:



ProjectWise Explorer V8i (SELECTseries 4)		
Datasource View Tools Window Help		
🖺 🗟 🕾 📑 🙋 💀 🐄 🏢 🔘 🗛	Search 🔹 🔛	
💠 👻 🟓 🚺 Address	▼ ▶Go	
ProjectWise Explorer Datasources	Name Description	
	There are no viewe registered that are able t	n display current selection

#### 3.1 Connecting

Because ProjectWise is build upon database tables, there must be a connection from the local machine to the ProjectWise Integration Server which is the service that controls all access to and from the database.

For creating the connection, select **Tools->Network Configuration Settings..** from ProjectWise Explorers top menu.

ProjectWise Explorer V8i (SELECTseries 4)						
Datasource View	Tools Window Help					
i 🖺 😪 🕾 i 🚭 i	Associations					
i	Messenger Local Document Organizer					
	Scan References and Link Sets					
	Load SLF Scan Spatial Locations Scan ESRI Files Enable Auto-Scan for CAD Files					
	Customize Interface Wizard Manager					
	Network Configuration Settings					
	User Management Options					

If windows present a User Account Control dialog box, Press: Ja or Yes here.

😌 User Account Control	×					
Do you want to allow the following program to make changes to this computer?						
Program name: Run a Verified publisher: <b>Micro</b>	legacy CPL elevated soft Windows					
Show details	Yes No					
	Change when these notifications appear					

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There are four tabs in the form for Network Configuration; there must be changed settings on three of these. The one not to be modified is: **iDesktop Auto-Login**. The other three tabs must be set like shown below.

If you are connecting via a Banedanmark computer (from the domain **bane.dk**):

ProjectWise Network Configuration Settings 🐱 ProjectWise Network Configuration Settings					×
General DNS Services Datasource Listing iDesktop Auto-Login	General DNS Services Datasource Listing iDesktop Auto-Login General DNS Services Datasource Listing iDesktop A			op Auto-Login	
General Settings	Servers		Servers		
ProjectWise V8i (SELECTseries 4)	Name Hostname	Port	Name	Hostname	Port
Version 08.11.11.590 - Commercial Release		Add	aanonw01 base dk	aanoow@1 bane dk	5800 Morfér
Copyright © 2014 Bentley Systems, Incorporated	aapppwui.bane.dk aapppwui.bane.dk	Remove	asppron.baile.uk	dappp to the lat	Remove
Loaded Modules		Kemove			
Common Libraries - 08.11.11.590 - Commercial Release DMS Libraries - 08.11.11.590 - Commercial Release					
Py6 Enabled					
Prevent UDP for DNS and Listing	Prevent UDP		Prevent UDP		
OK Cancel Apply	ок	Cancel Apply		ок	Cancel Apply

If you are connecting via other computers (from other domains than bane.dk):

🛊 ProjectWise Network Configuration Settings 😰 Met ProjectWise Network Configuration Settings 😰 Met ProjectWise Network Configuration Settings									
General DNS Services Datasource Listing iDesktop Auto-Login	General DNS Services	Datasource Listing iDeskt	op Auto-Login		1 6	General DNS Services	atasource Listing iDeskto	p Auto-Login	
General Settings	Servers				Ľ	Servers			
ProjectWise V8i (SELECTseries 4)	Name	Hostname	Port			Name	Hostname	Port	
Version 08.11.11.590 - Commercial Release				Add					Add
Copyright © 2014 Bentley Systems, Incorporated	projectwise.bane.dk	projectwise.bane.dk	5800	Modify		projectwise.bane.dk	projectwise.bane.dk	5800	Modify
Loaded Modules				Remove					Remove
Common Libraries -08.11.11.590 - Commercial Release DMS Libraries -08.11.11.599 - Commercial Release									
Prevent UDP for DNS and Listing	Prevent UDP					Prevent UDP			
OK Cancel Apply		ОК	Cance	Apply			ОК	Cancel	Apply

For setting the **DNS Service** and **Datasource Listing** type the desired values in the fields: **Name**, **Hostname** and **Port** and press: **Add**.

The value for both Name and Hostname is: **aapppw01.bane.dk** and for the field Port: **5800**. When the values are entered, press the **OK** button and press the **F5** key on the keyboard for refresh of the screen.

You should now see this screen:

🏕 ProjectWise Explorer V8i (SELECTseries 4)					
Datasource View Tools Window Help					
🕐 😪 😤 🛃 0.0 🐁 😳 🗰 🇮 🎯 🖓 × Search 🔍 🔹 🕨 View 🔹					
💠 🔹 🏓 Address 👻 🕨 Go					
	Name	Description			
For Help, press F1			12:34		

If this screen is shown you are successfully connected to the ProjectWise server, otherwise please contact the ProjectWise Administrator for support.

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Everyone using ProjectWise Explorer must connect to the ProjectWise Integration Server with a username and a password.

If you are a Banedanmark user (i.e. created in the bane.dk domain and can logon to this network) ProjectWise will use your logon credentials already given for the bane.dk network. Are your user not created in the bane.dk domain or are you logging into ProjectWise from outside the firewall, you will be asked for username and password.

Double-click on: **ProjectWise Production** in the left side of the application window and the following will happen:

			ege.			
Marchael ProjectW	ise Explorer Log in		X			
Datasource:	ProjectWise Production	•	Log in			
User Name:	Someone		Cancel			
Password:	•••••					
Use Windows Single Sign-On for authentication						
			th.			
	ProjectW Datasource: User Name: Password:	<ul> <li>ProjectWise Explorer Log in</li> <li>Datasource: ProjectWise Production</li> <li>User Name: Someone</li> <li>Password: ••••••</li> <li>Use Windows Single S</li> </ul>	<ul> <li>ProjectWise Explorer Log in</li> <li>Datasource: ProjectWise Production</li> <li>User Name: Someone</li> <li>Password: ••••••</li> <li>Use Windows Single Sign-On for authentic</li> </ul>			

For non Banedanmark users you will be asked for login credentials

Type the username and password you received from the ProjectWise administrator and press: Log in.

Banedanmark users will not be presenting this log in form, but will be automatically logged in.

The first time ProjectWise is started, you will be asked to create a local folder on you c-drive. This is where ProjectWise stores your local copy of the documents you are working on.

ProjectWis	e Explorer		
?	Working Directory c:\p\ Do you want to create i Click No to browse for a	vwork\someone doo t? a different folder.	es not exist.
	Ja	Nej	Annuller

Accept the suggested folder by pressing: Ja or Yes.

#### 3.2 The application window

ProjectWise Explorers user interface is split into three areas: Folders, Documents and Properties.

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on line and line an
Documents
There are no views registered that are able to display current selection.
Properties

In the Folder area you can navigate to the desired folder and in front of the different entries there are shown an icon. The explanations of these icons are listed here:

- The ProjectWise database. Contain all datasources.
- Datasource. The storage area for all documents.
- Project folder. A projects top level folder.
- Folder. Contain sub-folders and/or documents.
- Max Saved searches. Search criteria saved for later reuse.
- Components. Contain lists of components (if any) in the whole datasource.

All projects created in ProjectWise, are created under the folder: **Documents**. To see the projects the folder **Documents** must be expanded (opened), this is done by doubleclicking on the folder, or by clicking on the plus sign in front of the folder.

The operations in the document area could be: open folder, open document, free document, create new document, delete document, change the state of a document or show attributes (drawing-/model informations etc.) for a document.

The icons in the document area are shown below:

- Checked out. The document is locked by me for editing.
- The document has no associated application.
- Document set. A list of documents which will be checked out together.
- The document is exported outside ProjectWise for editing.
- Folder. Contain sub-folders and/or documents.
- The document is locked by another user and can be opened as read-only.
- Project folder. The projects top level folder.
- The document is read-only. Also used for old versions of a document.
- The document can be checked out and edited.
- Adobe Acrobat pdf document.
- AutoCad dwg Cad file.

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- Notepad document, Plain ASCII (text).
- MS Paint Image document (bmp, jpg etc.)
- MS Access database.
- MS Excel spreadsheet.
- PowerPoint presentation.
- MS Word document.
- MicroStation dgn Cad file.
- Outlook mail message.
- Internet web page or xml document.
- Jip compressed file.

The properties area is showing properties on the project, the folder or the document selected in the folder or the document area. These properties can be: created by, created date, version, locked by etc. for pdf, bitmap images and dgn documents can the area also show a preview of the document.

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### 4 Folders

#### 4.1 Structure

The first time ProjectWise is started, the folder structure is collapsed.



Open the folder: **Documents** in the folder area, project folders, folders, saved searches and component folders are shown. What exactly is shown here is depending on you rights, in ProjectWise you only see what you can access.

ProjectWise Explorer V8i (SELECTseries 4)		o x
Datasource Folder Document View Tools Window	v Help	
🕐 😪 🕾 🚭 🗛 🖓 🖓 📲 📰 🙆 🗛 • se	iearch 🙊 👻 🕨	
💠 🔹 🔹 🔛 🛛 Address 😣 pw:\\ProjectWise Test	▼ ▶Go	
	Name Description	
	There are no views registered that are able to display current selection.	
0 object(s) selected		10:04

By opening the project: **The New Line Copenhagen-Ringsted** at least 2 folders are shown (again depending on your access rights). The folder **CAD admin** is the place to find all MicroStation and AutoCad resource files for the specific project. Resource files used generally in Banedanmark (ex. Drawing borders and printer driver) are stored in the top folder: Resources.

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ProjectWise Evolorer V8i (SEI ECTseries 4)			- 🖂 X
Datasource Folder Document View Tools Windo	w Help		
n	Search (Q	•	
💠 • 💠 • 🚺 Address 🚱 pw:\\ProjectWise Test		▼ ▶Go	
	Name Description		
		There are no views registered that are able to display current selection.	
0 object(s) selected	1		10:08

Depending on what type of access you are giving, you will see either a **1 Pre Tender** or **2 Post Tender** folder. Below these folders are the projects documents stored.

The **2 Post Tender** folder is sub divided into multiple tender package projects. Every one of these sub-projects (ex. TP21) has special access assigned. This is done for isolating the participants of a certain tender packages from the rest of the tender packages.

In the **1 Pre Tender** folder is all the documents used for all the tender processes. This folder cannot be seen by participants in any of the tender projects.

No matter which category you are in, you will not be able to see the other categories folders and documents (e.g. Post Tender cannot see Pre Tender and Pre Tender cannot see Post Tender).



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#### 4.2 Folder contents - Project

The access control on every folder is specified individually, and only those with the proper rights can access documents in the folders. All users created to attend in Pre Tender access can, by default, read all documents and sub-folders in the **1 Pre Tender** folder, but only the users belonging to a specific discipline can create documents in the disciplines folder (ex. Users under the ART contract can create documents in the sub-folder: **Alignment**).

Beside the folder and document access control there are workflow access control on both the folders and the documents. The workflow access control on folders is set so all users in the Pre Tender group can read the contents of all the sub-folders in **1 Pre Tender**.

There are created 6 groups for controlling the access to both the folders and the documents. These groups are:

- CR\_Pre\_ART Users under the Alignment Railway Technology contract
- CR\_Pre\_CDC
- Users under the CDC contract
- CR\_Pre\_EKS Users under the Expropriation contract
- CR\_Pre\_LED Users under the Utility Relocations contract
  - CR\_Pre\_SNC Users under the Soil & Nature contract
- CR\_Pre\_BDK\_View
- Banedanmark View-Only users
- CR\_Pre\_BDK\_Approve
- Banedanmark Approver users

The group: CRE\_Pre\_ART have access to write, when documents are in Draft state, to the following folders: *Alignment*, *Catenary*, *Drawings DGN*, *DTM*, *Power Supply*, *Roads*, *Storm and Sanitary*, *Structures* and *Tracks*.

The group: CRE\_Pre\_CDC have access to write, when documents are in Draft state, to the following folders: Architect, Bridges, Drawings DGN, DTM, Power Supply, Roads, Storm and Sanitary, Structures and Tracks.

The group: **CR\_Pre\_EKS** have access to write, when documents are in **Draft State**, to the following folders: *Drawings DGN* and *Expropriation* 

The group: **CR\_Pre\_LED** have access to write, when documents are in **Draft State**, to the following folder: **Drawings DGN**, **DTM** and **Utility** 

The group: **CR\_Pre\_SNC** have access to write, when documents are in **Draft State**, to the following folders: *Drawings DGN*, *DTM*, *Environment*, *Landscape*, *Soil Engineering* and *Structures*.

The group: **CR\_Pre\_BDK\_Read** have access to read document, independent of the workflow state, in all folders.

The group: **CRE\_Pre\_BDK\_Approve** have access to write metadata, not to the actual file, when documents are in **Pending Approval BDK** and **Approved state**, to the following folders:

Alignment, Archaeology, Architect, Bridges, Catenary, Drawings DGN, DTM, Environment, Expropriation, Geotechnic, Landscape, Power Supply, Roads, Soil Engineering, Storm and Sanitary, Structures, Tracks and Utility.

All Groups, except for CR\_Pre\_BDK\_Read, can create and delete documents in the folder: **Interdisciplinary**.

The groups: **CRE\_Pre\_ART, CRE\_Pre\_CDC, CRE\_Pre\_EKS, CRE\_Pre\_LED** and **CRE\_Pre\_SNC** all have their own workingfolder. No one else but the group owning the folder can read the content of these folders. The group members are free to create subfolders to the workingfolder.

The users belong to the groups: CR\_Pre\_ART, CR\_Pre\_EKS, CR\_Pre\_LED or CR\_Pre\_SNC can delete documents in folders they can create documents in, long as the documents are in Draft State.

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As soon as the documents leave Draft State and enter another state, the documents become readonly for these groups.

When a document I ready for approval by BDK, the user rightclick on the document, and select: Change State  $\rightarrow$  Document for Approval

MOVE FOR		
Rename	Document For Approval	
Delete	Approve Document	
Modify	Reject Document	
Modify Spatial Attributes	New Revision	
Add Comment	Document Obsolete	
Add comment	March	
Set 🕨	Next	
Send To	Previous	
Copy List To	Change	
Attributes	Set Final Status	
Changes State	Deserve Final Status	
Change State	Remove Final Status	

When this state is selected a mail form is shown. In this form you can type in the email address of the person that need to approve this document. This approval is only Banedanmarks CAD approval, not the technical approval.

When the approver response to the approval process, two options are possible choise. Either the document can be approved, then the approver is changing the state to: **Approved**, or the approver can reject the document. In this case the document returns to **Draft** state, a new version is created and the minor revision number is changed. If the document is approved, a new version is created and the major revision number is changed.



#### 4.3 Folder contents - Resources

The folder structures for the resource (MicroStation and AutoCad) documents are:



Standard resources for Banedanmark

Resources placed in folders under the projects are used specific for this project.

### 5 Workflow

All folders in the Pre Tender part of the project, except for: **Drawings Archive** and **Interdisciplinary**, have by default set the state: **Draft**. This means that when a new document is created it will initially be put into the state: **Draft**.



#### 6 Basic concept

The basic concept for ProjectWise is to share informations in projects. This is done by storing all documents in the same physical area throughout the projects lifetime, keep track of versions and expand informations with metadata. To make sure that only one user at a time can manipulate the documents ProjectWise is using locks, check out and check in of documents. To edit a document it

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needs to be checked out to the user at the local machines c-drive and locked for other user's manipulation on the server. The check out process is run automatically when opening the document. When checking out a CAD file, all references will be copied out as well, but as read-only. Furthermore all the resources, which are specific for Banedanmark and the project, will be copied out as well. All modifications are done to the file on the locale c-drive which makes read and write faster. When the document is closed, only the modified parts of the document are written back to the server, this is again an optimazation upon speed and network traffic.

#### 6.1 Locks

When a document is opened from the user's computer, a lock is set on the document stored on the server. As long as this lock is set no other users can modify the document, it is however possible to read the document.

When modifications to the document are finished the corrections must be written back to the server and the document must be released. This is done by: *Check in* of the document.

By doing this other users are then able to check out the document for corrections.

If you want to update the copy placed on the server, but will keep the document locked to you self, you can perform an: *Update Server Copy* function. This gives other users the ability to see the newest corrections in the document, but the document will still be locked for modifications.

If you do not want your corrections to be written back to the server but just want to release the lock on the document, you can perform a *Free* command. Remember that all corrections will be lost.

For an explanation of these commands, see chapter 6.

### 7 Document manipulation

Manipulations are done by selecting one or more documents in the document area and right clicking your mouse. The only command available without right clicking is: **Open** which opens the document in the standard application for the specific file type.

#### 7.1 Open / Open with



Open the selected document by chosing one of the folowing methodes:

**Open** (or double click on the document) will copy the document to the locale computer (as shown in chapter 4) and opens it whit the application associated with the documents prefix (ex. .dgn = MicroStation. .pdf = Adobe Acrobat Reader, .docx = MicroSoft Words).

Right click and select: **Open With.** This gives a list of all the application able to open the specific file type. This could be useful if different applications are able to open documents with the specific prefix.

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ect		
Name	Description	Application
KicroStation V8i (SELECTseries 3)	Bentley MicroStation	"C:\Program Files (x86)\Bentley\MicroStation V8i (SELECTseries)\MicroStation\ustation.exe" -v
🙀 Power Rail Track V8i (SELECTseries 2)	Power Rail Track V8i (SELECTseries 2)	"C:\Program Files (x86)\Bentley\PowerRailTrack V8\PowerRailTrack\PowerRailTrack.exe" %1
•	Ш	
Always use this program		Browse
Open document as read-only		
lick here for a list of suggested document vie	wers	

Chose the desired application and click on the **OK** button. The document will then be copied out and opened as described above.

When the document is *checked out* there will be shown an icon in front of the document name in ProjectWise document area. For the user whom has checked the document out, the icon is: and for all other users:

#### 7.2 Check out / Copy out / Export...

The *Check out* command copy the selected document to the locale computer and lock the document on the server, but do not start the application associated with the documents prefix.

The *Copy out* command copies the selected document to the locale computer, but do not lock the document on the server.

*The* **Export...** command starts a wizard to copy the selected document to the locale computer, either for later import or just as a copy.

Document Export Wizard						
	Welcome to the Document Export         Wizard         Choose an action to perform <ul> <li>Export - Locks file, changes can be re-imported</li> <li>Send to Folder - Creates unmanaged local copy</li> </ul> The Send to Folder option will download unmanaged local copies of the selected documents so they can be sent out for review.					
	< Back Next > Cancel					



The **Export** function is used when the document shall be modified in "off-line mode" and later "imported" to the server. This method locks the document on the server, and do not release it until the document is "imported" again.



The **Send to Folder** function copy out the document to a folder by your own selection, but do not set a lock on the document on the server. The document cannot be "imported" again.

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When the method is selected, press: *Next* > select a folder on the locale computer for placing the document and press: Next >

Document Export Wizard				×
Define the export se Specify an export f	<b>ttings</b> older and click Next to begin the export.			
Export folder:				
C:\Temp\Bentley			Browse	
Export comment:				
Previous Comments;				<b>*</b>
	< Ba	ick	Next >	Cancel

#### 7.3 Check in



**Check in** copy the document back to the server and release the lock. The command will automatically be run when the application, in which the document is opened, is closed. It is however possible to run the command from ProjectWise by selecting the locked document, right click and chose **Check in**. It is only possible to check in documents checked out by your self.

Check In					X
General					
Documents					
Name		State	Docume	nt Number	
✓ M DK_KP2000.	dgn				
Taldam Fine	III T-+			4	
Folder: Finn -	Test				
Create new version	n during Check In				
Version:					
Check In	Update Server Copy	Fre	e	Cancel	

#### 7.3.1 New versions



The function: **Create new version during checkin** do not work in BDK projects due to the workflow states. All version changes are done through the workflow.

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#### 7.4 Update server copy

 Update server copy
 can, for some applications, be executed from inside the application by selecting: File from the main menu and perform: Update server copy

 Update Server Copy
 Ctrl+Shift+S

Or when the document is closed in the associated application. (See the figure in chapter 6.3)

This command writes the corrected data from the locale copy of the document back to the server, but do not release the lock. This can be used so other users can read the new contents in the document and see progress in the project, but not edit the contents.

#### 7.5 Free



The *Free* command removes the lock on the document on the server, but do not copy any corrections back to the server. The *Free* command can be executed when the document is closed in the associated application. (See the figure in chapter 6.3) or by selecting the document in ProjectWise document area, right clicking and selecting *Free*.

Only in special occasions must *Free* be used as NOTHING is copied back to the server, it rejects all modifications performed to the document in the active session.

Free can be used when no corrections are made, ex. It the document is checked out for print only.

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#### 7.6 Create new

There are two ways to create a document in ProjectWise. The document can be imported or it can be created (born) inside ProjectWise.

To import a document, select and drag the document outside ProjectWise and drop it in ProjectWise document area for the desired folder. Use then the wizard starting after worth.



To create a document inside ProjectWise, select **Document->New->Document** from ProjectWise menu bar.

A wizard guiding the user through the steps in creating the document is started; this is the same wizard as for importing documents described above. If no wizard is starting please set the default wizard as described in chapter 8. Documents must always be created using **Advanced Wizard**.

If the document is created inside ProjectWise, the first step in the wizard will be **Use ProjectWise document as a template** if the document is imported the first step will be: **Use external file as a template**.

Advanced Document Creation Wizard	×
Select a Template You should select a template for created document. Only ProjectWise document or external file can act as a template.	
Our Use Project Wise document as a template	
not selected	Select
Use external file as a template	
	Browse
Select from recent used templates	
D:\ProgramData\Bentley\MicroStation V8i (SELECTseries)\WorkSpace\Projects\Exam	
۸ III ا	
< Back Next >	Cancel

If the document is imported do not change the settings. If the document is created inside ProjectWise press the **Select** button and browse to the template you will be using.

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After selecting the template you will be asked for a **Document Code**. The document code is a unique name for a document throughout the whole database. Document code and document name must be the same. (For more information about document coder, see chapter 8)

The next step in document creation is the attribute page. On this page are some of the metadata stored together with the document. These metadata will be synchronized with the title block or the model block of the CAD files. (For more information about the metadata, see chapter 9)

#### 7.7 Delete

If a document shall be deleted this is done by selecting the document, right click and select **Delete**. Be aware that all old versions of the documents will be deleted along with the current version of the document.

#### 7.8 Copy / Copy to / Move to

There are different ways to move a document from one folder to another.

**Copy** puts a copy of the document in ProjectWise clipboard, you then navigate to the destination folder and select the command: **Paste**.

Copy to works in a similar way as Copy, but you will be guided through the process via a wizard.

Nove Document		×
Move		
Source Document		
Folder:	Seed	
Document Name:	ModelSeed.dgn (1)	Select
File Name:	ModelSeed_1.dgn	
Move Options		
Move File		
Move Attributes		
Move Document Ve	ersions	
Destination Document		
Folder:	pw:\\sdkcga6320.wsatkins.co 🔻	Select
Document Name:	ModelSeed.dgn (1)	
Description:	ModelSeed	
File Name:	ModelSeed_1.dgn	
	OK	Cancel

*Move to* show a form where destination folder and name must be supplied.

**Copy** leaves the original document in the source folder, **move to** do not. To use the: **Move to** you need to have Delete rights to the document. Remember to change document code and filename if necessary.

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#### 7.9 Rename



When a document need to have a new name, both the document code and the name must be changed. By selecting the command: *Rename;* only the name can be changed.

🏞 Rename Docu	ment	
Rename		
Document		
Name:	TARTR_1_SFAU11_002	
Description:	NBDKX_3DM	
File Name:	TARTR_1_SFAU11_002.dgn	
	OK Cancel	]

To change the document code, you must select: Attributtes->Document code

Magnet Co	ode / TARTR_1_SFAU11_002	X
Code fields		
file_type	T	▼
Contract	ART	<b>-</b>
discipline	R	<b>•</b>
type _	1	<b>•</b>
Locality _	SFAU11	<b>•</b>
seq_no _	2	Generate
		Next available
TARTR_1_SFA	U11_002	
<u>A</u> dvanced ₹		Save Clear Cancel

#### 7.10 Local Document Organizer

*Local Document Organizer* is used to create an overview of which document are checked out and which document are copied out on the local computer. With *Local document organizer* you can free disk storage by purging the documents you have copied out, update servercopies or check in documents.

#### Local Document Organizer

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Market Local Document Organizer - Checked Out Documents								
Organizer View	w Action							
🗸 🔟 🖬 🖬 💋			6 %   G L	4				
Filters								
Dataso	urce: Project	Wise Test			•			
·	vode: ws3118	30						
	User: pwadm	in			-			
Fo	older:							
Name	Description	Туре	File Name	Folder Na	2	Local File	File Revision	Time Fet
✓₩ TARTR	NBDKX_3DM	Checked Out	c:\pwwor	Drawings	*			16-12-20
				111				•
1 object(s)	_				_			-11

**W** I Filter buttons: **Checked out**, **Copied** and **Exported**. The window shows the local copies acording to the fileter selected.

赵 🤣 🚱 For checked out documents: Update server copy, Check in, Check in -Leave copy, Free – Leave copy and Free.



✓ 🐼 🔩 For copied out documents: Check out, Refresh copy and Purge copy.

E 🔄 For Exported documents: Import and Import from.

#### 8 **Document wizard**

Document wizard, or Advanced wizard, must be used for creation of all documents. The wizard's purpose is to supply the document with document code. The alternative to this wizard is: No wizard which do not supply the documents with document code but only create a document with the same name as the template. Advanced wizard must always be used when creating new documents in ProjectWise.

#### 8.1 Setting up

To set up ProjectWise to use Advanced wizard the following must be done. Select: Tools->Wizard Manager.. from the ProjectWise menu.

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Select Advanced Wizard and press: Set as Default.

Wizard Manager	X
Document Creation Sear	rch Definition
Wizard List	
	· 🔁
No Wizard	Advanced Wizard
Default: Adv	anced Wizard
Set as Default	About Properties
	Class

To remove some of the pages in the wizard, containing informations never used, click on: **Properties.** 

Advanced Document Creation Wizard Properties	x
General Ontions	
In the winer for Decument Mew command	
Use wized for Multiple desurrent exerting	
Use wizard for Multiple document creation	
Use wizard in file import operation	
Use wizard in document paste/drop operation	
Don't copy attribute values from a template document	
Wizard Pages	
Skip 'Introduction' page	
Skip 'Target Folder' page if folder is already defined	
Skip 'Template' page if template is already defined	
Skip 'Attributes' pages	
Skip 'Document Properties' page if properties are already define	ed
Skip 'Create Document' page	
Skip 'Completion' page	
OK	cel

The settings can, as a minimum, be set as shown above, when finished press: OK.

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#### 9 Document code

Document code is a unique value, across the database, and used for identifying a document. Document code is generated of one or more attributes defined for the folders environment. Document code is being used to secure that there is only one document stored in the datasource with that specific name. If no document code was defined, documents with the same name could exist in different folders in the datasource. When creating a document the document code will also be the documents physical filename.

#### 9.1 Document names

The document code is depending on which folder the document is created in. As an example is shown the document code for Drawings DGN:



efine Docum You should	nent Code define (generate) unique document code.	
Document Ur	nique Identifier	
file_type	T •	
Contract	▼	
discipline	· · · · · · · · · · · · · · · · · · ·	
type _		
Locality	▼	=
seq_no _		Generate
	Nexta	vailable
	Next a	vallable 🗸
(NULL)(NULI	Next a	vallable
[NULL][NULL]	Next a	vallable •
[NULL][NULI ] Show Adva	Next a	valiable
"[NULL][NULI ] Show Adva	Next a	valable 📃
[NULL][NULI ] Show Adva	Next a	valiable
[NULL][NULI	Next a	valiable
[NULL][NULI	Next a	valiable
[NULL][NULI	Next a	valable
[NULL][NULI	Next a	valiable
[NULL][NULI	Next a	valabie

To create the document code select values from the drop down picklists to the different fields, and type in, and press the **Generate** button, for setting a serial number.

### 10 Attributes

Attributes are metadata stored in the database along with the document. Attributes are defined in the folders environment. Some of these attributes are part of the document code while others are pure additional data. Some of the attributes are initialized at document creation manually others get their values automatic.

Attributes are shown under the tab: *Attributes* in the dialog box that popup when right clicking on the document and selecting: *Properties..* 

Drawings and models have additional attributes for revisions on the tab: More Attributes.

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#### 10.1 CAD documents

For CAD documents most of the attributes are equal to the informations stored in either the model block or the title block.



As some attributes are part of the document code they cannot be modified through the properties dialog box. Informations, not part to the document code, shown in the title block or model block can be modified here, and will the next time the document is opened in the CAD application, be synchronized in the document with informations supplied in this dialog box.

General	Security	Attributes	More Attributes	Audit Trail	Workspace	Components	Spatial	
Drawi	ngs D(	3N						
Projec	t							
The N	lew Line C	Copenhager	n-Ringsted					
Title 1								
sd								
Title 2								
sfsf								
Title 3								
sffs								
Docur	nent numb	er		Re	vision			
TAR	R_1_SFA	U11_002		01	.01			
Contra	ct							
ART		*						
Scale								
1:500		•						
Unit								
Rema	rk							
								^
								-

eneral Security Attributes	More Attributes	Audit Trail	Workspace	Components	Spatial	
Drawn on						
Drawn by						
Reviewed on						
Reviewed by						
Approved on	1515151					
Approved by						
Revision drawn on						
Revision drawn by						
Revision reviewed on						
Revision reviewed by						
Revision approved on						-
Revision approved by						
Revision 1						
Revision 2						
Revision 3						
Revision 4						
Revision 5						
Revision Description 1						
Revision Description 2						
Revision Description 3						
Revision Description 4						
Revision Description 5						-
1						

#### Attributes for a drawing file

oaei						
Project						
The New Line (	Copenhagen-Ring	sted				
Section		Tender Pac	kage :	Contract		
Urban	•	TP 003	•	P10		Ŧ
Title 1						
Title 2						
Title 3						
Document Num	ber		Revision			
MP10F_3_AFV	_1_001					
Drawn by	Drawn on					
Scale	Coordinate	System				
1:1	▼ KP2000-S				•	
Remarks						
						~
						~

#### The tab: More Attributes

General Security Attributes	More Attributes	Audit Trail Worl	kspace Components	Spatial	
Revision1 date					
Revision1 init					i [
Revision1 lin a					
Revision1 lin b					
Revision1 lin c					
Revision2 date					
Revision2 init					
Revision2 lin a					
Revision2 lin b					
Revision2 lin c					
Revision3 date					
Revision3 init					
Revision3 lin a					
Revision3 lin b					
Revision3 lin c					
Revision4 date					
Revision4 init					i L
Revision4 lin a					
Revision4 lin b					
Revision4 lin c					
Revision5 date					
Revision5 init					
D 11 DF					K I

#### Attributes for a model file

#### The tab: More Attributes

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### 11 Replacing documents

Along with the document, several metadata are saved. If a fysical document (the disk copy) need to be replaced with another one, but the metadata need to be retained, this can be done the following way.

Select properties on the document:

General Sec	urity	Attributes	More Attributes	File Properties	Audit	Trail	Worksp	bace	Compone	nts	
Document											
Name:		Book	Book1xlsx								
Description:		Book	Book1								
Version:				Wo	rkflow						
Sequence:		0		Sta	State:						
Application:		Micr	osoft Excel	▼ De	partme	nt:	<none< td=""><td>&gt;</td><td></td><td>•</td></none<>	>		•	
Status:		Chec	ked In	No	de:						
Out to:				On							
Created By:		LARS	\$1955	On		25-02	2-2014 1	3:48:2	29		
Updated By		LARS	1955	On		25-02	2-2014 1	3:48:2	29		
File											
File Name:		Book	1 xlsx					A	dvanced -		
File Size:		8.06	KB	Sto	rage:		PW_St	torage	•		
File Updated	d By:	LARS	1955	On		25-02	2-2014 1	3:48:2	29		
Folder											
Name:		Test_	Finn\Office\Exce	ł							
Description:		MS E	xcel Dokumenter								
Environmen	t Name	: Office	•								
Description:		Office	•								
						_					
Save		Undo	Close	k			1/1		>	>	

From the tab: Generel, press the drop-down menu: Advanced.



For replacing the document with another document stored inside ProjectWise, select **Replace**. From replacing the document with another document, stored outside ProjectWise, select **Import**.

ProjectWise	e Explorer	
1	Are you sure you want to replace this If this document is a master with refer you must run Scan References to ensu new file.	document's file? rences ure reference integrity with the
		Yes No

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