

ProjectWise Access for Consultants

The purpose of this document is to provide consultants guidance on managing electronic documents stored in the UDOT ProjectWise system. ProjectWise is used to organize and manage electronic files required for the Design Process Manual's project file. Typical files that are stored in the project file include reports, studies, permits, mapping, terrain models, survey control, correspondence, and email, if it contains project decisions or pertinent information. Project documents that are not digitally signed or do not exist in an electronic format, shall be scanned and submitted to the UDOT ProjectWise system in pdf format.

ProjectWise Access

In order to access information in ProjectWise, a ProjectWise account is needed. A ProjectWise account is how individuals are identified in ProjectWise; how document and project creations and revisions are tracked, and how access to information is provided. In ProjectWise, users are members of work groups. Work groups are one or more individuals responsible for portions of the project work. Consultant firms are considered as a work group and all individual accounts created for a consultant firm will be added to that work group. Sub consultants to a consultant firm will be granted the same project access as the consultant firm.

To request access to the UDOT ProjectWise system, the consultant firm should fill out the **Consultant ProjectWise Access Request Form** and then have the UDOT Project Manager fill out the **PM Consultant Project Access Request Form** for each project (PIN) that the consultant firm needs access to. These forms are described in, and can be downloaded from, the article entitled "Consultant ProjectWise Access Request Form" under the "ProjectWise" subtopic of the UDOT ETS Web site. User accounts are created using the individual's first name initial and last name with no spaces in between (i.e. Gary Williams = GWilliams). If the username already exists in the system, an "_#" will be added to the name (i.e. GWilliams_1). By obtaining a ProjectWise account an individual is able to submit material to UDOT on his or her firm's behalf. Consultant firms should consider carefully who they select for creating an individual account for the UDOT ProjectWise system. Consultant firms need to notify UDOT using the Consultant ProjectWise Access Request Form to remove individuals when they leave their company. The individual account will then be disabled and removed from the consultants work group.

Working with ProjectWise

There are two main ways a consultant firm can access the UDOT ProjectWise system. Consultants can work directly in the UDOT ProjectWise system using the ProjectWise Explorer (this is the recommended way). This will check out and open the document, while automatically downloading a copy to the local computer. The document is placed in Checked Out status. When opening a MicroStation file, ProjectWise automatically copies out associated reference files and workspace to the local computer. When the application is closed, ProjectWise prompts to check the document back in. This method of access creates a large internet traffic demand and depending on the consultant's internet bandwidth, may be considered to be too cumbersome for the consultant to use.

For consultant firms with slow internet access, consultants can access the system by exporting the documents from the system. Consultants should export and import documents directly from the UDOT ProjectWise system using the ProjectWise Explorer or the ProjectWise Web client. Consultants should export documents to their own network and either import them back into ProjectWise or use the Update Server Copy command as updates are completed, such as project milestones, or as project needs dictate.

New documents created by consultants should be initiated in ProjectWise, whenever possible, thus assuring the document attributes are properly attached to the document at time of creation (an import of multiple documents requires time to properly attribute each file). Once a document is created in ProjectWise, it can then be exported to the consultant's network. Drawing files must be created using the project seed file located in the "2 CADD Resources\Workspace\data\" folder. When drawing files containing references are added to ProjectWise, the Scan References Utility needs to be run to ensure that reference relationships are kept up to date. The consultant shall ensure that all reference files are added to ProjectWise.

Procedures for Working with the UDOT ProjectWise System

These procedures are based on the use of the ProjectWise Explorer program. For instructions using the ProjectWise Web Client, use the [ProjectWise V8i Web User Manual](#) document. This can be downloaded from the "How to access ProjectWise via the Web" subtopic under the "ProjectWise" subtopic of the UDOT ETS Web site.

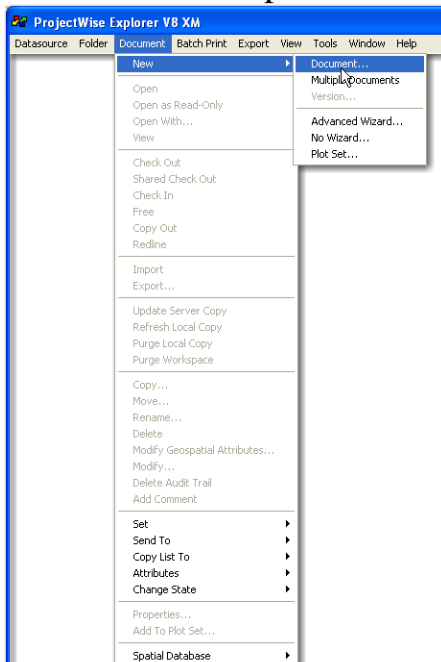
Setting Up Local Storage Area

UDOT has created a program to replicate the directory structure and CADD environment on a local storage area. For instructions on using this program, refer to the [Using CADD Setup Utility for Exported ProjectWise Projects](#) document. This can be downloaded from the “CADD Downloads” page under the “CADD” subtopic of the UDOT ETS Web site.

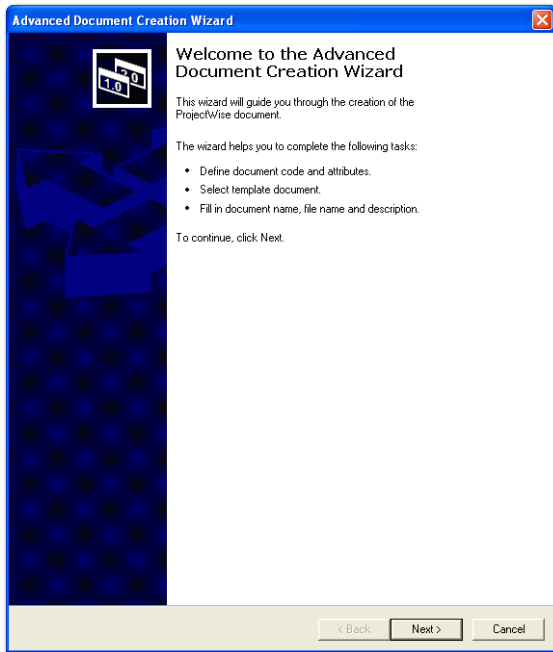
Note: A Drawing Files folder has been added to the local directory structure for the MicroStation drawing files used for the project. When a MicroStation drawing file is exported, the reference files are copied to the same directory as the master file. By exporting all MicroStation files to the same directory, file duplication will be eliminated. The MicroStation drawing file must be stored in the correct directory in the UDOT ProjectWise System. The Drawing Files folder is only used in the local directory structure.

Creating a New Document in ProjectWise

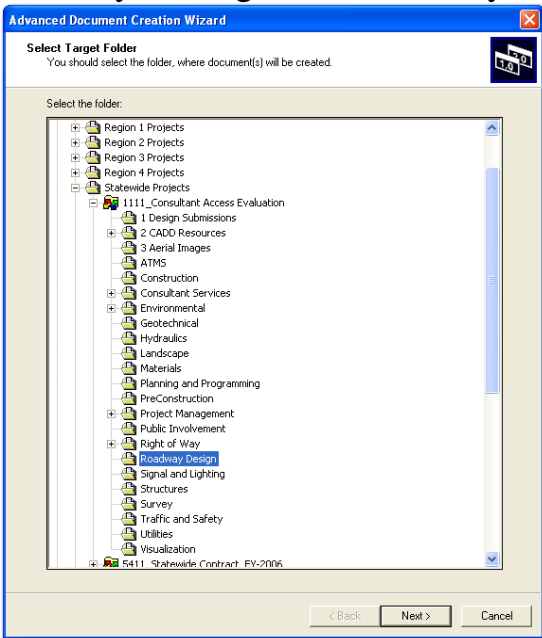
The advanced document creation wizard must be used to create new files in ProjectWise since the wizard will ensure that the required information is properly entered. To create a new document in ProjectWise Explorer, go to the *Document* pull down menu and select *New>Document* or *New>Advanced Wizard...* An additional way to create a document is to drag it from the desktop and drop it into the document pane of the folder it should reside in.



- The Advanced Document Creation Wizard will launch.



- Verify the target folder where you want the new document to reside.



- Select the template file in the next dialog box. Three options are available to choose from:

Use ProjectWise document as a template

This option is used to create a new document based on an existing ProjectWise document. An example would be the MicroStation seed file that is located in the project's "2 CADD Resources\Workspace\data" folder. Another location for templates is in the "Custom Folders\Global Folders\Document Templates\CADD" folders (the Borders, TitleSheets, and Excel Summary Sheets are located here).

Use external file as a template

Select this option if the document exists on your computer or network. If you drag and drop a file into ProjectWise, this option will be selected using the file that you used.

Select from recent used templates

Files or documents that have recently been used by the document wizard will be listed here.

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.

☒ Use ProjectWise document as a template
 ... not selected ... Select...

☐ Use external file as a template
Browse...

☐ Select from recent used templates

F:\Shared\PP\Generator\Instructions.doc
 H:\Projects\11111_Consultant Access Evaluation\2 CADD Resources\Civil Data\Desig
 pw\UUTSTSRCON547:projectwise_xm\Documents\ETS Group\Bob Peterson\Docum
 pw\UUTSTSRCON547:projectwise_xm\Documents\ETS Group\Bob Peterson\Templ
 pw\UUTSTSRCON547:projectwise_xm\Documents\UDOT Projects\Region 1 Project
 pw\UUTSTSRCON547:projectwise_xm\Documents\UDOT Projects\Region 3 Project
 pw\UUTSTSRCON547:projectwise_xm\Documents\UDOT Projects\Statewide Project
 pw\UUTSTSRCON547:projectwise_xm\Documents\UDOT Projects\Statewide Project

< Back Next > Cancel

- When the Define Document Attributes page opens, you can enter the values in the attribute fields that have been configured for the interface you have selected. Note that the **Document Type** field is required and must be selected before proceeding to the next page. The "+" after the Document type name, indicates that there are subtypes available for that document type.

Advanced Document Creation Wizard

Define Document Attributes
You should define environment specific document attributes.

Roadway Design

PIN: 1111 Project Number: STP-1082(1)13 Route: County: BOX ELDER Region: Region 1

Project Name: FOREST STREET, I-15 TO BRIGHAM CITY Beginning MP: 0.000000 Ending MP: 0.000000

Interface: Roadway Design

Document Type (Req'd): Drawing Files + Document Subtype: Proposal

Document Group:

Organization:

Municipality:

Submit to Electronic Plan Room:

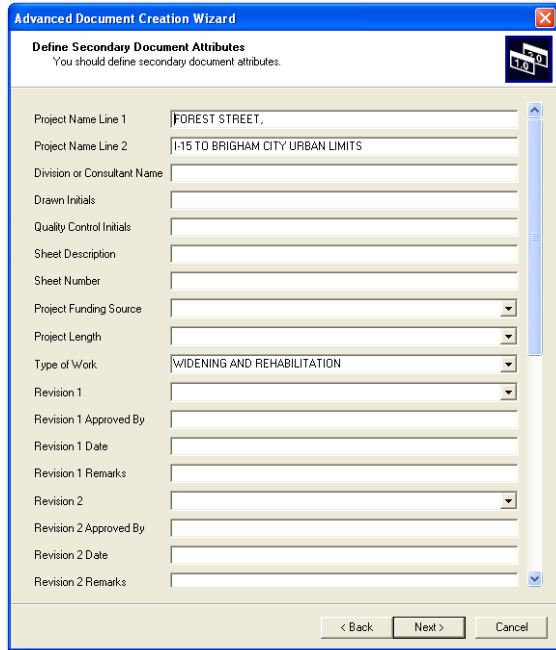
☐ Include in Plot Set?

Advertisement Submission

☐ Mark for Advertisement? ☐ Mark for Addendum? ☐ Mark for Award?

< Back Next > Cancel

- Depending upon the interface selected, you may see the Secondary Document Attributes dialog box where you can enter additional information about the document. The information on this page is used for the title block integration.



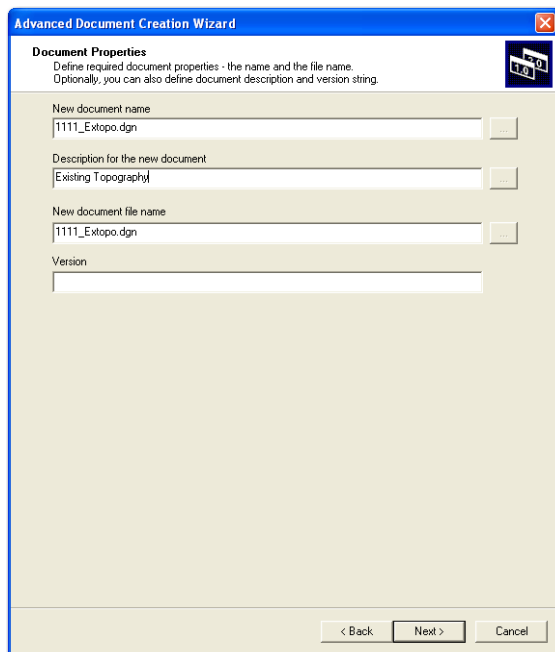
The image shows a software dialog box titled "Advanced Document Creation Wizard" with a sub-header "Define Secondary Document Attributes". Below the sub-header is a small instruction: "You should define secondary document attributes." and a small icon of a document with a checkmark. The dialog box contains a list of fields for entering document information. The fields are: Project Name Line 1 (text box with "FOREST STREET."), Project Name Line 2 (text box with "I-15 TO BRIGHAM CITY URBAN LIMITS"), Division or Consultant Name (text box), Drawn Initials (text box), Quality Control Initials (text box), Sheet Description (text box), Sheet Number (text box), Project Funding Source (dropdown menu), Project Length (dropdown menu), Type of Work (dropdown menu with "WIDENING AND REHABILITATION"), Revision 1 (dropdown menu), Revision 1 Approved By (text box), Revision 1 Date (text box), Revision 1 Remarks (text box), Revision 2 (dropdown menu), Revision 2 Approved By (text box), Revision 2 Date (text box), and Revision 2 Remarks (text box). At the bottom of the dialog box are three buttons: "< Back", "Next >", and "Cancel".

Field	Value
Project Name Line 1	FOREST STREET.
Project Name Line 2	I-15 TO BRIGHAM CITY URBAN LIMITS
Division or Consultant Name	
Drawn Initials	
Quality Control Initials	
Sheet Description	
Sheet Number	
Project Funding Source	
Project Length	
Type of Work	WIDENING AND REHABILITATION
Revision 1	
Revision 1 Approved By	
Revision 1 Date	
Revision 1 Remarks	
Revision 2	
Revision 2 Approved By	
Revision 2 Date	
Revision 2 Remarks	

< Back Next > Cancel

- In the next dialog box, you can enter document properties such as the document name and description as well as the new document's file name. Do not change the document name if you did a drag and drop with multiple files (the document name and document file name will be automatically populated).

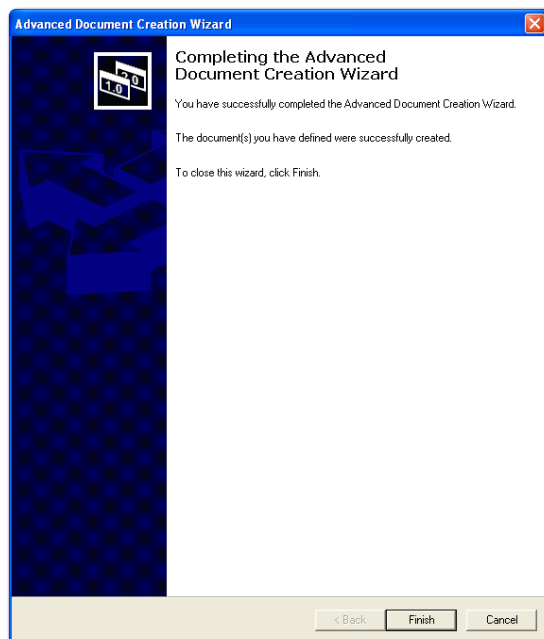
Note: The **New document file name** is the actual name of the file as it is saved on the disk and must have a file extension. The **New document name** and the **New document file name** must be the same.



- The last dialog box will allow you to review the choices you've made. If you need to make any changes, use the Back button to go back to the appropriate dialog box and make changes. There are also two options at the bottom of the window. The first option "*Launch associated application*", if checked, will launch the application that is associated with that file extension. The second option "*Apply selected options to succeeding documents*" is used when multiple files are dragged and dropped into ProjectWise. This option keeps the user from having to run the Advanced Document Creation Wizard for each additional document. Do not use the second option if the document names were changed on the previous dialog box (all files imported will use the new name).



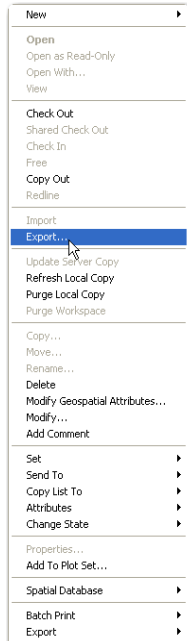
- Complete the wizard by selecting *Finish*.



Exporting Files to the Local Drive

To export a file, select the file(s) that you want to export and then right-click or select the Document pull down menu to see the document options.

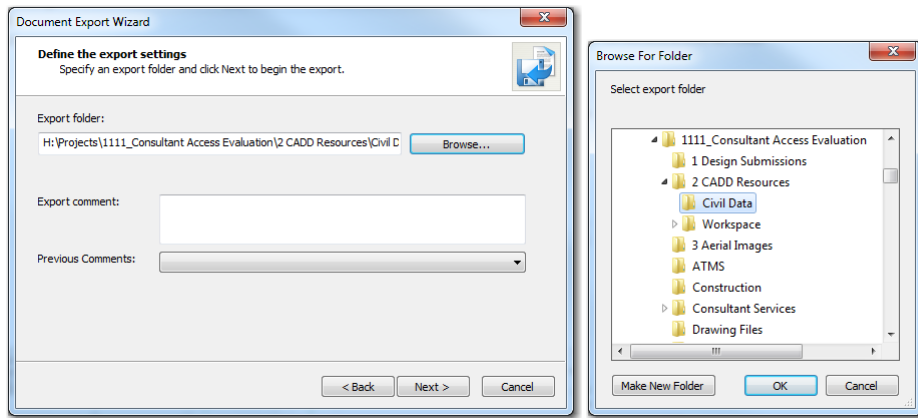
- Select *Export...* and the export wizard will launch.



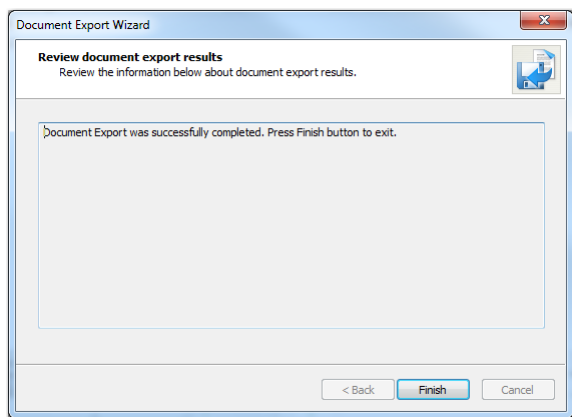
- Choose the appropriate action that you want to perform. Choose the *Export – Locks files, changes can be re-imported* option for documents that will be downloaded to the local drive, modified, and then brought back into ProjectWise. Choose the *Send to Folder – Creates unmanaged local copy* option to download documents to the local drive that will not be returned to ProjectWise. (See the ProjectWise Help for a more detailed explanation)



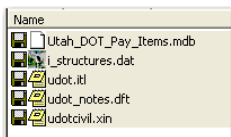
- Select the folder that the files will be exported to by clicking on the *Browse...* button and selecting the matching folder (unless the files are drawing files) on your local directory structure. *Select Next>* to export the documents.



- Select the *Finish* button.



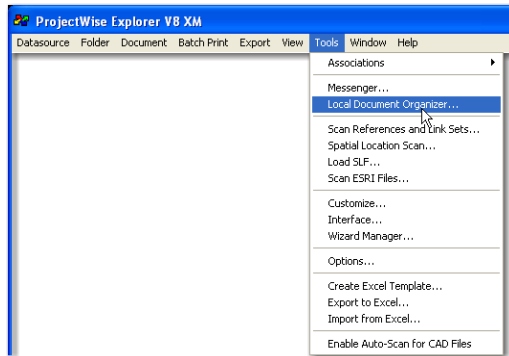
Repeat this process for all files to be exported to your local drive. Files that have been exported will have a disk icon next to the file name.



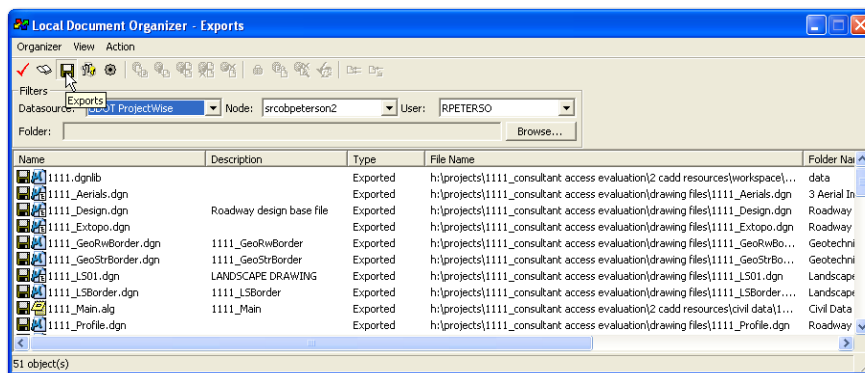
To view the location where a document was exported to, go to the audit tab in the document properties for the exported document or use the Local Document Organizer tool (View>Exports).

Local Document Organizer Usage to Update or Import

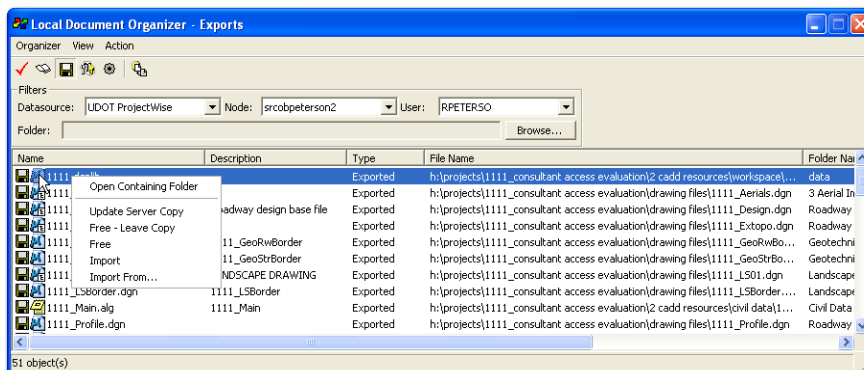
The Local Document Organizer can be used to manage the documents that you have exported from ProjectWise. The Local Document Organizer can be accessed from the Tools pull down menu.



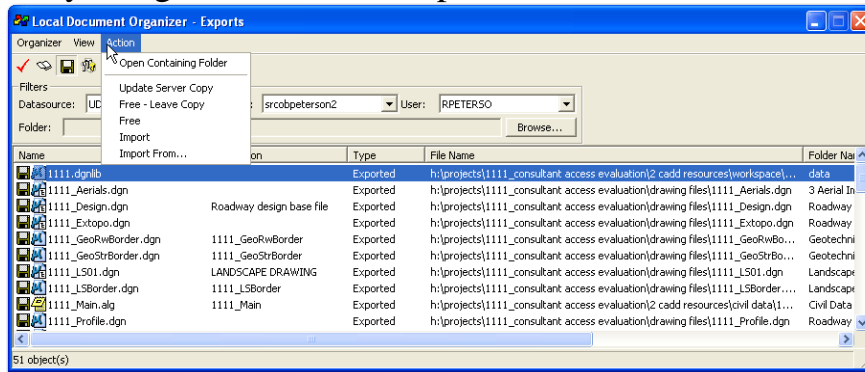
Access the Exports listing by selecting the disk icon button or from the View menu pull down and choosing Exports.



The Import or Update Server Copy commands can be accessed by right clicking on the documents



or by using the Action menu pull down.



The *Update Server Copy* command is used to update the file that is located in the UDOT ProjectWise System so that other users can see the latest changes to a document. The document will remain in the exported list and will allow the consultant to continue to modify the document on the local storage area.

The *Import* command will check in the document to the UDOT ProjectWise System so other users can modify the document. The *Import* command removes the document from the local storage area. When a project is completed, all files must be imported.

Title Block Integration for MicroStation Documents

Title block integration has been configured in the UDOT ProjectWise System and the title block tags in MicroStation files are updated when a file is opened, checked out, or copied out using the ProjectWise Explorer program. The project attributes and the attributes located on the More Attributes tab in the DGN document's properties dialog are used to populate the title sheet, border and sheet file title block tags. The title sheet and border files have the title block tags that are common to all sheets built into the file (i.e. project name, project number, county). Sheet files have the title block tags that are specific to the sheet (i.e. sheet number, sheet description, initials) added to the drawing by placing the TITLEBLK, TITLEBLK(8x11), TITLEBLK-RW or TITLEBLK-STR cell from the Sheet.cel cell library.

Documents that are exported do not update the title block tags to reflect the attributes assigned to the document. If the title block tag has been modified with the MicroStation Edit Tags command, the tag will be overwritten when the file is opened from the ProjectWise Explorer program. There are several options

for avoiding the problem of losing title block tag information (listed in order of preference):

- Option 1: Modify the tags with the MicroStation Edit Tags command and modify the document attributes in ProjectWise to match the DGN file. (Disadvantage – information is added twice)
- Option 2: Import the document. Modify the document attributes for the title block tags. Check out the document to enable the titleblock integration and then check in the document to update the server copy. Export the document. (Disadvantage – slow network traffic when checking out and in the documents)
- Option 3: Rename the Tag set or change the tags to text in MicroStation so the title block integration doesn't find and modify the information. (Disadvantage – the document attributes in ProjectWise do not match the DGN content)
- Option 4: Run the Attribute Bulk Update utility after the files have been imported and before opening the document in ProjectWise. (Disadvantage – all title block tag attributes are populated even if not shown in DGN file originally, ie. Revision fields)