


This is basic ProjectWise training that is available online using the Adobe Connect and Adobe Presenter software. Welcome to the Utah Department of Transportation ProjectWise V8i User Training Presented by the ETS Group. This training will help you gain the knowledge to work within the ProjectWise Explorer environment. Use the Next button to advance and the Back button to go back and review a previous topic.



It is for the purpose of training individuals at their own pace in their office. The modules are set up in such a way that you can watch it from start to finish, or just view the sections you need to. It will be a great tool for review for all users.



ProjectWise Training Modules


- **Module 1 Introduction**
 - Launching ProjectWise Explorer
 - Windows Explorer/ProjectWise Explorer
 - ProjectWise Explorer Screens
 - The Three Panes
 - Data Source Pane
 - Document Pane
 - Preview Pane
- **Module 2 Logging into ProjectWise**
 - Datasource Login
 - Logging In
- **Module 3 ProjectWise Tool Bars**
 - Standard
 - View
 - Interface
 - Address

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This training presentation is divided into modules. Each module covers a specific topic. The first module will cover the Introduction to ProjectWise Explorer, and get you used to the ProjectWise Explorer Screens. Module two shows you the process for Logging into ProjectWise, and module three covers the ProjectWise Explorer Tool Bars.



ProjectWise Training Modules *continued*


- **Module 4 Working Directory and Folder Structure**
- **Module 5 ProjectWise User View and User Interface**
 - User View and Interface
 - How to Open the Interface
- **Module 6 ProjectWise Icons**
 - Check Mark
 - Lock
 - Pencil
 - Open Book
 - Disk
 - Tag
 - How are ProjectWise Icons used
- **Module 7 Checking out a Document**
 - Checking out a document cont.
 - Open as Read Only
 - Open With
 - Viewing Documents

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Module four shows the Working Directory and Folder Structure, in module five we will cover the ProjectWise User and User Interface. In module six we will cover the ProjectWise Icons, and explain the use of each icon. Module seven shows Checking out a Document so you can work with your files. Files that you check out can be worked on in the usual way.





ProjectWise Training Modules *continued*

- **Module 8 Copying out a Document**
 - Copying
 - Select Target Folder & Select a Template
 - Document Properties & Create a Document
 - Finish Copying
- **Module 9 Checking in a Document**
 - Check in
 - Check in cont.
- **Module 10 Documents**
 - Document Creation Wizard
 - Select Target Folder
 - Select a Template
 - Document Attributes
 - Document Attributes cont.
 - Document Subtypes
 - More Attributes
 - Document Properties
 - Create a Document
 - Completing the Document

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In module eight, we work on Copying out a Document, and in module nine Checking in a Document will be covered. Module ten covers Documents and using the Document Creation Wizard to create and attribute your documents.



ProjectWise Training Modules *continued*

- **Module 11 Set Files**
 - Set Files
 - Creating New Set Files
 - Folder and Set Name
 - Adding Files to a set
 - Modifying a Set File
- **Module 12 Workflows and States**
 - Workflows and States for Right of Way
 - Changing States
 - Workflows and States
- **Module 13 Deleting Files in ProjectWise**
- **Module 14 Document Export Wizard**
 - The Two Options
 - Review Document Export
 - Audit Tab and Local Document Organizer
 - Importing Files that were Exported from ProjectWise

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In module eleven we look at Set Files and in module twelve Workflows and States will be covered. Module thirteen Deleting Files in ProjectWise will be covered, module fourteen covers how to use the Document Exported Wizard tool.



ProjectWise Training Modules *continued*


- **Module 15 Drag and Drop Import**
- **Module 16 Searching for Document**
 - ProjectWise Search
 - Find Documents Icon
 - Search Form
 - Search Builder
- **Module 17 Saved Searches**
 - Saved Searches
- **Module 18: Global Searches**
 - Saved Searches
- **Module 19: Personal Searches**
 - Saved Searches
- **Module 20: Custom Searches**
 - Creating a Custom Search

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Module fifteen covers the Drag and Drop Import procedure. Module sixteen takes you through Searching for Documents this is where the power of ProjectWise comes in, using the ProjectWise Search, the Find Documents Icon, the Search Form and the Search Builder. In module seventeen we cover Saved Searches. Global Searches are discussed in module eighteen. Personal Searches are discussed in module nineteen. Module twenty is about Custom Searches.



ProjectWise Training Modules *continued*

- **Module 21: Full Text Search**
 - Full Text Search
- **Module 22: Search Builder**
 - Search Builder Options
- **Module 23: Define Criteria Window**
 - Define Criteria Window
- **Module 24 Logging Out of ProjectWise**
- **Module 25 Accessing the Local Document Organizer**
 - Viewing Checked Out Documents with the Local Document Organizer
 - Saving your Changes
- **Module 26 Support Resources**

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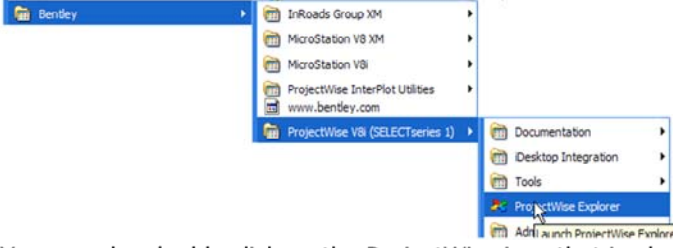
In module twenty one covers Full Text Searches. Module twenty two is the Search Builder and module twenty three will cover the Define Criteria Window. Logging out of ProjectWise is covered in Module twenty four. Accessing the Local Document Organizer is discussed in module twenty five. The last module, module twenty six has a list of ProjectWise Support Resources.





The following slides will show the ProjectWise Explorer environment, and discuss the screen panes that you will be using inside the ProjectWise Explorer environment.

 **Launching ProjectWise Explorer**

- To launch ProjectWise Explorer go to:
Start > Programs > Bentley > ProjectWise V8 XM > ProjectWise Explorer



- You can also double click on the ProjectWise icon that is placed on your desktop

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Launching the ProjectWise Explorer is as easy as navigating to the program through the Start menu or double clicking on the ProjectWise Explorer Icon.

Windows Explorer and ProjectWise Explorer

ProjectWise Explorer is similar in layout and operation to the familiar Windows Explorer

Windows Explorer

ProjectWise Explorer

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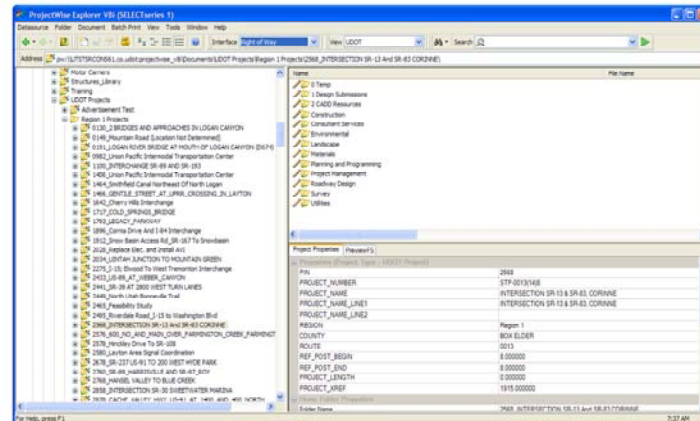
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There are similarities between the Windows Explorer Screen and the ProjectWise Explorer Screen so moving from the Windows Explorer environment to the ProjectWise Explorer environment should be easy for users. Both the Windows Explorer and ProjectWise Explorer have a Data Source pane and a Document pane. Both systems have the same capabilities to drag and drop files into the appropriate locations.



ProjectWise Explorer Screens

- ProjectWise Explorer is the primary user interface into a ProjectWise datasource
- ProjectWise Explorer integrates with applications like Office, MicroStation, and AutoCAD



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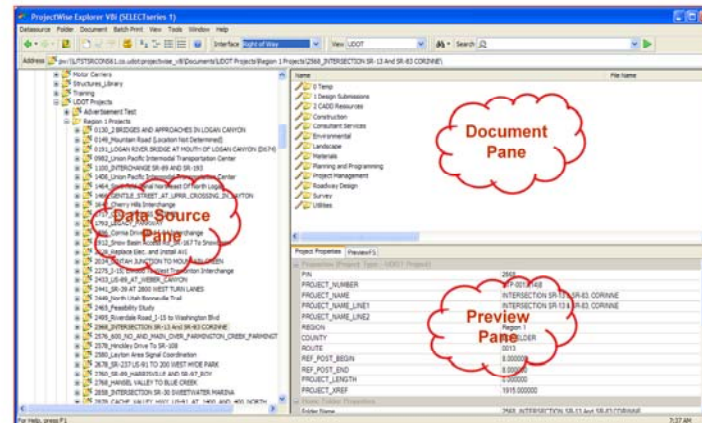
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The primary interface that the user will be working in, is the ProjectWise Explorer. ProjectWise Explorer integrates with most common applications including Microsoft Office applications, Adobe, and CADD programs like MicroStation and Autocad. The next few slides will cover each of the three panes in detail.



The 3 Panes of the ProjectWise Explorer

Datasource, Document, Preview




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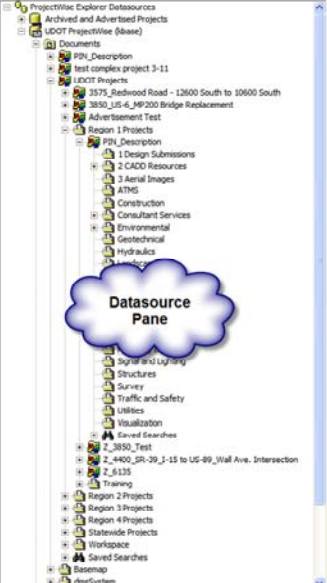
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There are three panes in the ProjectWise Explorer, it consists of the **Datasource** pane which is the left side window, the **Document** pane is the upper right window, and the **Preview** pane is the lower right window.




Datasource Pane


- The datasource pane is located on the left hand side of the ProjectWise Explorer window.



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The Datasource pane is where the folder structure is shown. Navigating in the Udot folder structure is easy since it is a flat folder system.



Document Pane

- By default the document pane will display file names, file descriptions, status, and the document creator
- All Document related commands can be accessed by the pop-up menu that appears when right-clicking on a document

Version	Name	Description	File Name	Status	Created By
	bikefrme.dgn	bikefrme	bikefrme.dgn	Checked In	admin
	brake.dgn	brake	brake.dgn	Checked In	admin
	cnstrn.dgn	cnstrn	cnstrn.dgn	Checked In	admin
	detail.dgn	detail	detail.dgn	Checked In	admin
	flowtags.dgn	flowtags	flowtags.dgn	Checked In	admin
	plan.dgn	plan	plan.dgn	Checked In	admin
	plant.cit	plant	plant.cit	Checked In	admin
	plant.dgn	plant	plant.dgn	Checked In	admin
	tag.dgn	tag	tag.dgn	Checked In	admin




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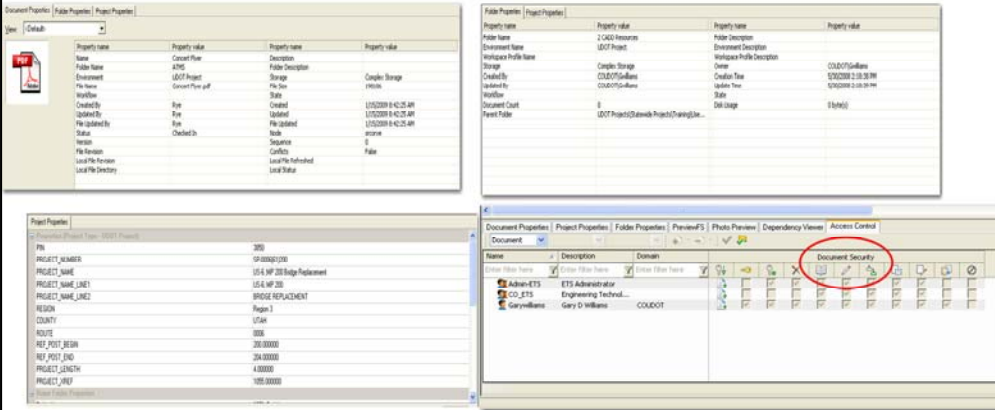
When a folder is highlighted in the Datasource pane, the **Document** pane shows all the files in that folder.



Preview Pane

- Document Properties tab
- Project Properties tab
- Folder properties tab
- Access Control
- Document Thumbnail

• Toggle display by going to View > Preview Pane




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The **Preview** pane shows information that is determined by the tab you have selected, the tabs are located at the top of this pane. There are many tabs at the top of this pane, some of these tabs are the **Document** tab, the **Project Properties** tab and the **Folders Properties** tab along with a new **Access Control** tab. The **Document** tab contains information about the document that has been highlighted in the Document pane. Items include: creation date of the document, who created the document, the status and file size along with a list of other important information about the document. The **Project Properties** tab includes items that are pertinent to the project including the PIN Number, Project Number, Region, County, Route along with other information that is associated with the project. The **Folder Properties** tab includes all the information about the folder name and description, the environment and where the folder is stored, who created the folder when it was updated and by who, it also lists parent folders as well. The **Access Control** tab allows you to change securities on that document without going into the properties of the document like in older versions of ProjectWise.




The following slides will explain logging into the ProjectWise Explorer environment and show the user logged into the UDOT ProjectWise Datasource.

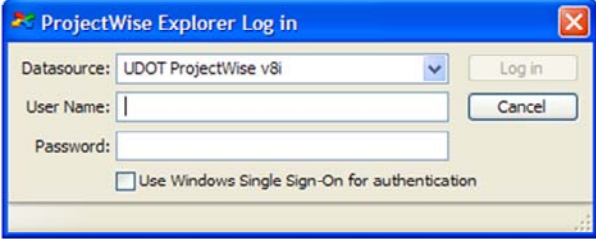


Logging In

You can log in to ProjectWise by double-clicking on a datasource, or go to
Datasource > Log in



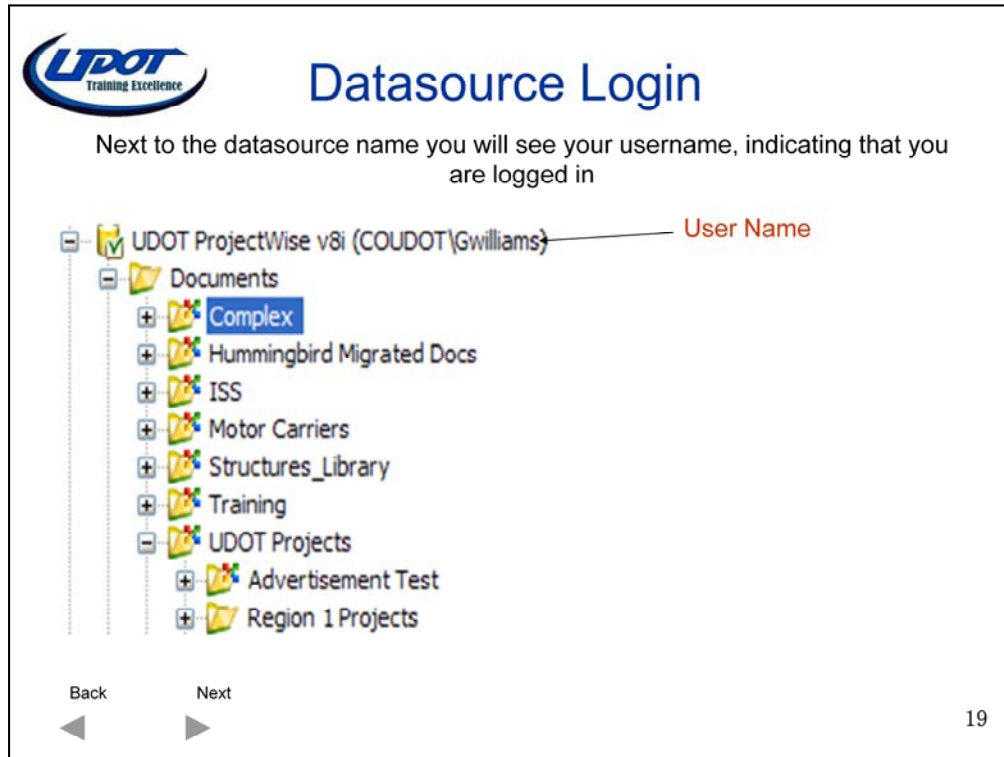
Enter User name and password



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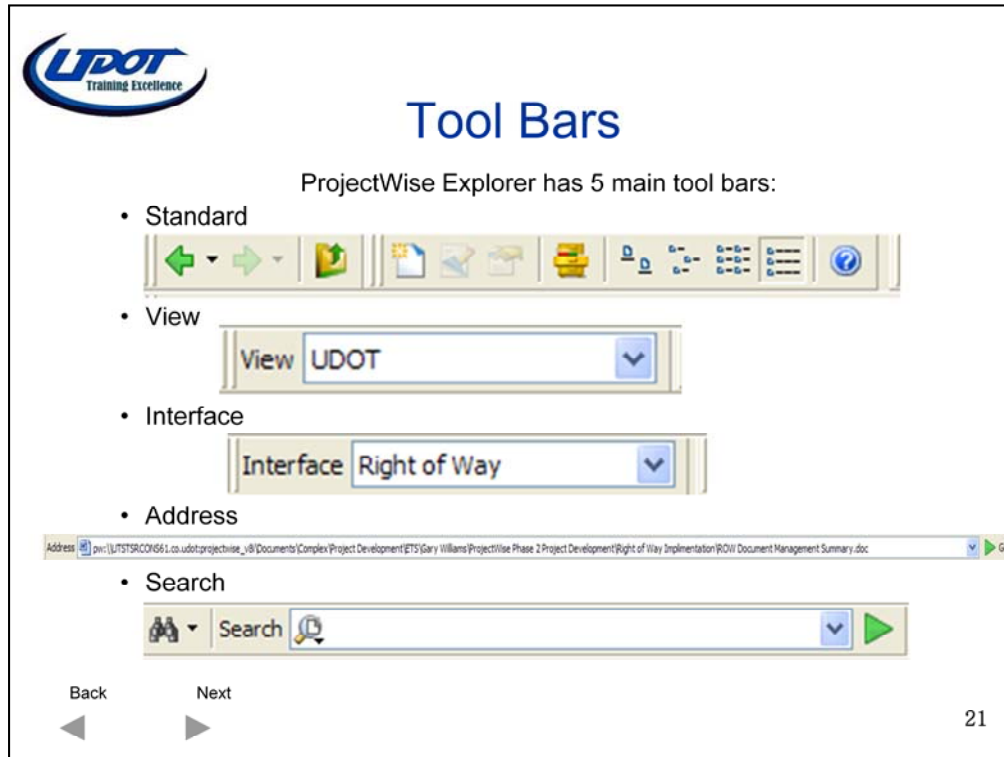
When logging into the ProjectWise Explorer on another computer, click on the **Datasource** pull down, or right click on the UDOT ProjectWise Datasource, then select the **Log in...** command, the **ProjectWise Explorer Login** dialog box pops up, enter your User Name and Password. This is your network login and password. **Note:** When you launch ProjectWise Explorer, and navigate to the Udot ProjectWise Explorer Datasource, all Udot employees will be logged in because ProjectWise uses a single sign on system, meaning that you logged into your computer and ProjectWise recognizes that you are logged in.



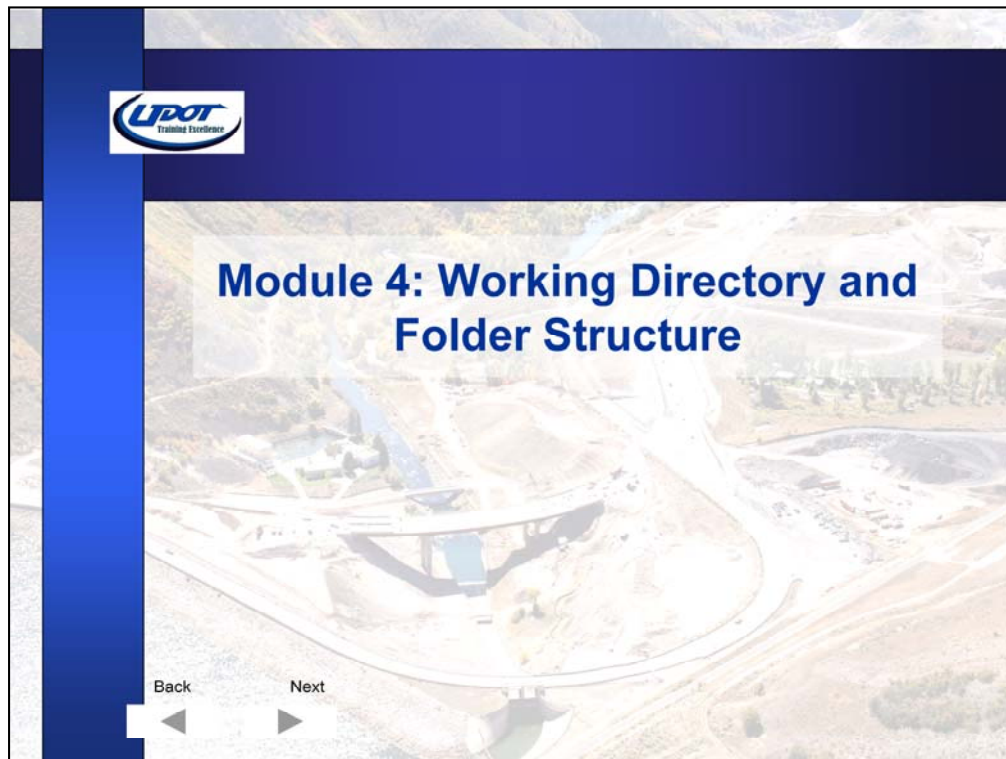
To verify that you are logged into ProjectWise Explorer, look for your login name next to the Datasource name. **Note:** This is a good check when logging into someone else's computer.




The following slide will now cover the tool bars that are used within ProjectWise. The tool bars are located at the upper most part of the ProjectWise Explorer window.



There are 4 main tool bars that ProjectWise Explorer has, these are the Standard, the View, the Interface and the Address tool bars plus the search bar. The **Standard** tool bar includes the New Document button, as well as Open Document, Properties, Find Documents, this is a search tool and the Local Document Organizer. You can choose to display Large Icons, Small Icons, List or Details, then there is the Help and Browse up buttons. These tools are just like the standard tools you find in the Windows Explorer environment. In the **View** tool bar you have the choice of selecting the Advertisement, Project or the UDOT views, these views correspond to how you will see the information displayed in the Document pane. The **Interface** tool bar gives you the choice of selecting which area you are working in: such as Roadway Design, Right of Way, Project Manager, Materials Geotech, ...ect. You can select which discipline area you work in from the drop down menu to set the correct Interface. **Note:** Some people may be in one or more of these disciplines and it will require changing to the correct interface in order to work in the right environment. The **Address** tool bar is a locator to where the Project, Folder or File is located. The **Search** Toolbar is similar to the Google type search where as you type in a word or phrase and ProjectWise will return search results based off this search criteria.

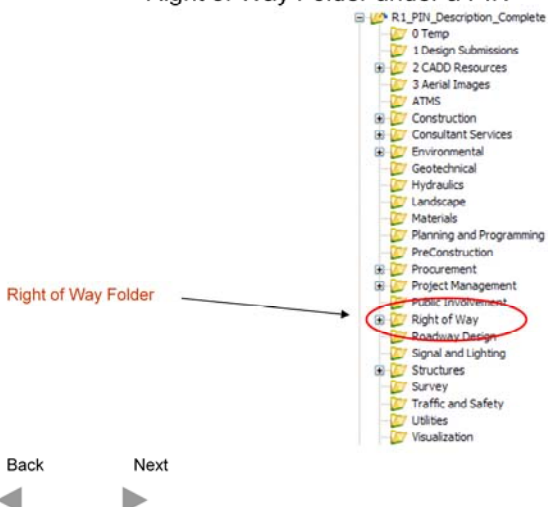


The next slide shows the Working Directory and Folder Structure used within the ProjectWise Explorer Environment for Right of Way.



Working Directory and Folder Structure

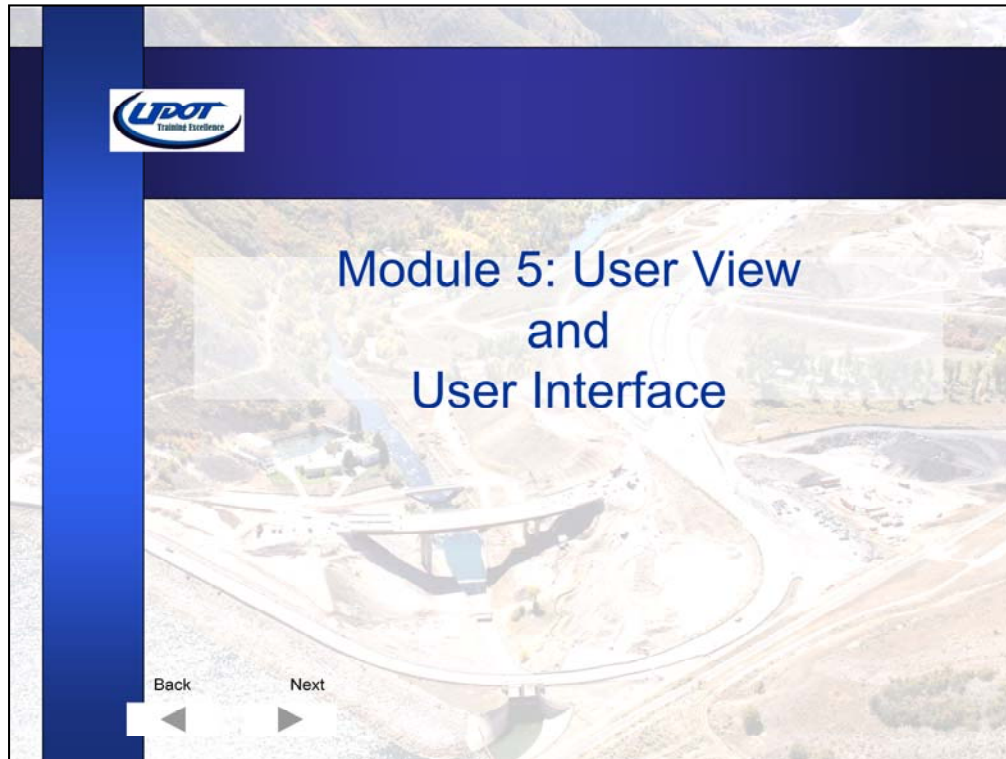
- Right of Way Folder under a PIN



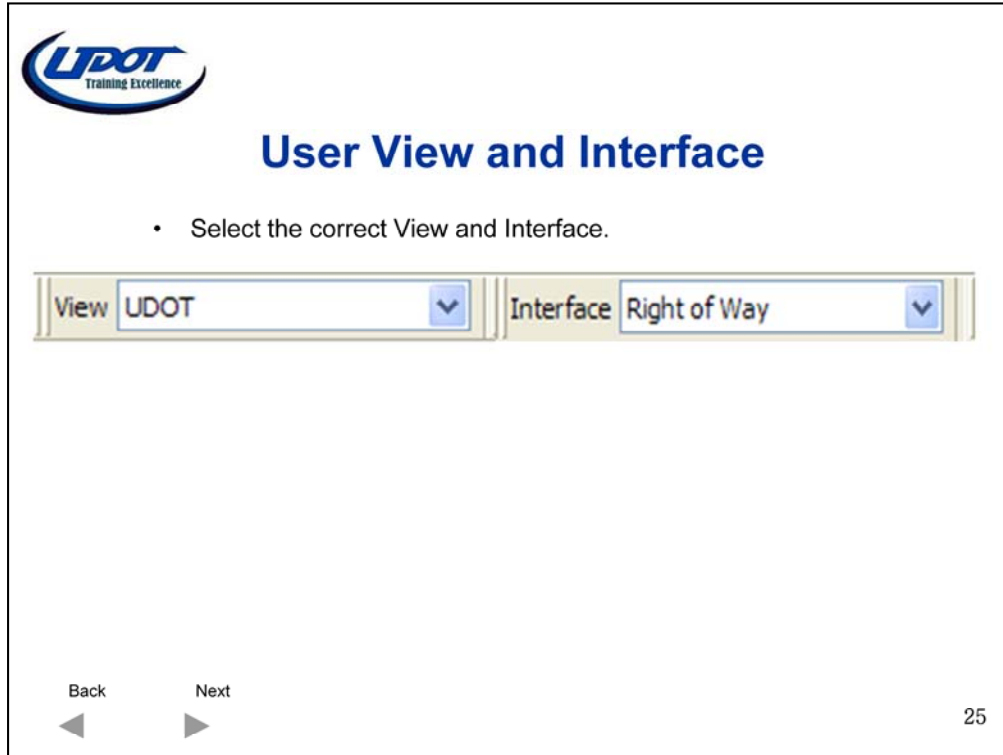
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The **Udot Project Folder Structure** has been changed to incorporate a simpler flat folder design, using the ProjectWise Explorers Searching capabilities eliminates the need to use a lot of subfolders. Each discipline will have its own folder that their working documents will reside in. **Note:** There are some groups that have a Confidential folder, the reason for this is they work with sensitive documents such as contracts and agreements. Also the CADD Resources folder has subfolders that are needed to run CADD and Civil Data related resources and programs. Everyone has access to this section of folders and subfolders.




The following slides will explain the User Views and the User Interfaces used within the ProjectWise Explorer environment for Right of Way.



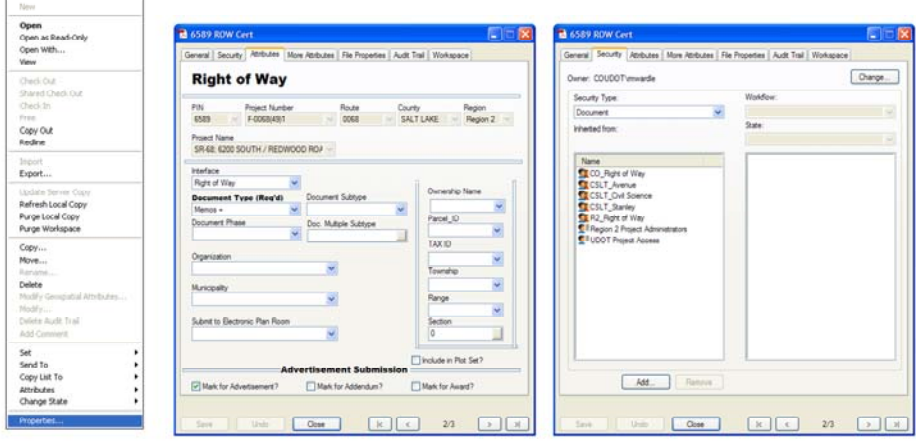
The screenshot shows a software interface titled "User View and Interface" with the LIDOT Training Excellence logo in the top left. A bullet point instructs the user to "Select the correct View and Interface." Below this, there are two dropdown menus: "View" set to "UDOT" and "Interface" set to "Right of Way". At the bottom left are "Back" and "Next" navigation buttons with corresponding arrow icons. The page number "25" is in the bottom right corner.

Each group will be working within a set **View** and **Interface**. At the top of the **ProjectWise Explorer** window is a pull down menu for you to select the correct **View** and **Interface** you need to be working in. Select the view **UDOT**, then select the correct **Interface (Right of Way)**. This is the group you work in.



How to Open the Interface

- The Interface selected also determines the layout of the search form.




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To open the Interface dialog box, highlight the file you want to see the information on, either hit the space bar or right click and select **Properties**. It has various tabs at the top of the dialog box. The **Security** tab shows who is the owner of the document, the Security Type, the workflow of the document and the documents State. This is where you can add and remove rights to your own documents. Shown here is the **Right of Way**. Note: shown is the **Attribute** tab.





There are six Icons used in the ProjectWise Explorer. These Icons will be covered in the following slides.



Icons


- Check Mark** – Indicates document is checked out to you

- Lock** – Indicates document is checked out by another user

- Pencil** – You have read/write access to document

- Open Book** – Document is read-only

- Disk** – Document is exported

- Tag** – Document is in Final Status


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There are six **Icons** that give special information to the ProjectWise users, these are the **Checkmark**, it lets you know that you have the document checked out to yourself. The **Lock**, it indicates that the document is checked out by another user. The **pencil**, indicates you have read/write access to the document. The **Open Book** icon, shows that it is read only access. The **Disk**, icon indicates that the document has been exported out as a managed copy. The **Tag**, shows that the document has been set to final status. **Note:** only an administrator can remove the **Final Status**.



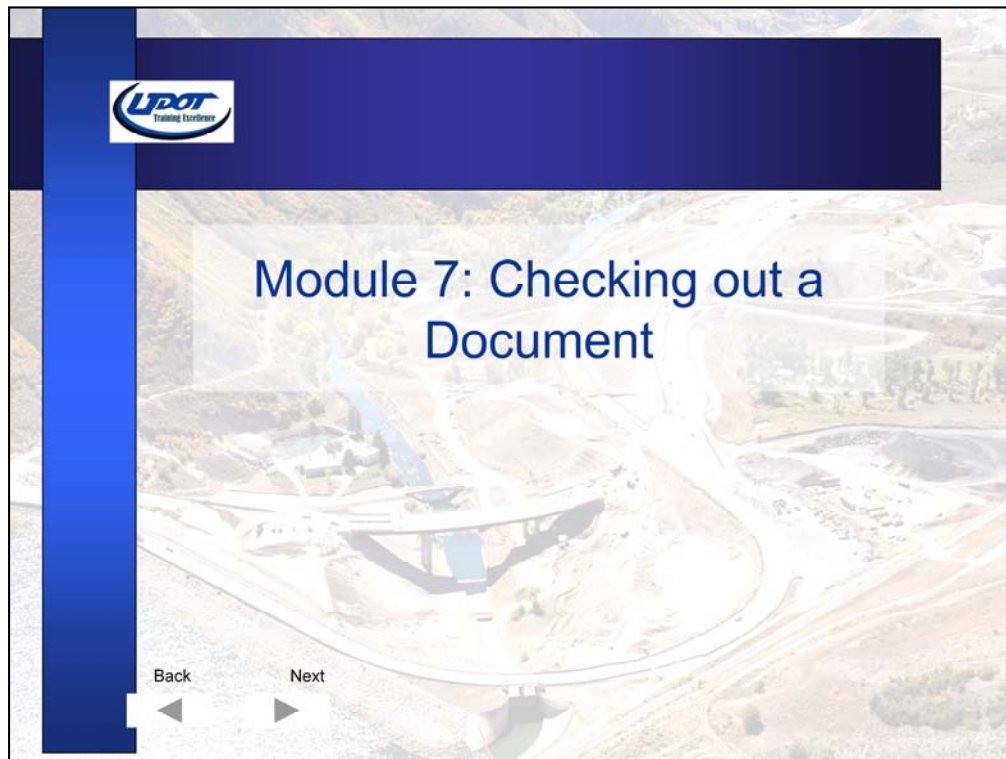
Icons As They are used

Name	Out to	File Updated	File Updated By	Application	File Size	
✓ 3850_LSBorder.dgn	Gwilliams	5/15/2008 2:06:46 ...	RPETERSO	MicroStation	48128	4/4/2008
🔒 3850_existing_contours	jbuckley	11/1/2007 2:32:24 ...	RPETERSO	MicroStation	5801984	4/9/2008
✎ 3850_proposed_contours		5/23/2008 8:51:02 ...	RPETERSO	MicroStation	5801984	4/9/2008
📖 EC-1		5/23/2008 8:51:04 ...	RPETERSO	MicroStation	65024	4/9/2008
💿 EC-2	Gwilliams	5/23/2008 8:51:05 ...	RPETERSO	MicroStation	67584	4/9/2008
🏷 EC-3		5/23/2008 8:51:09 ...	RPETERSO	MicroStation	65024	4/9/2008

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The first Icon in the graphic above is the Check Mark, it indicates that the document is checked out to you. Next is the Lock, it indicates that the document is checked out by another user. The third Icon is the Pencil indicating you have Read/Write access to the document. The Open Book is the fourth Icon, and indicates to the user that you have Read Only access to this document. The fifth Icon is the Disc Icon, letting you know that this document has been exported out of the ProjectWise Environment. The last Icon is the Tag Icon and indicates that the document has been set to Final Status.

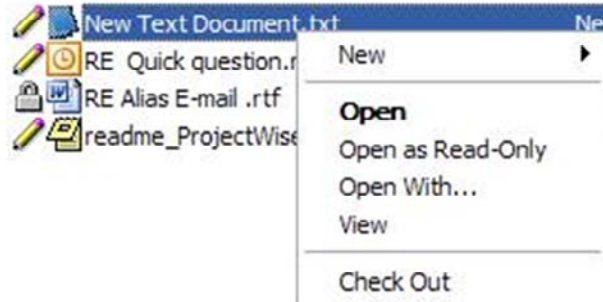


The slides that follow will cover the procedure for checking out a document from ProjectWise. When a document has been checked out of ProjectWise Explorer the owner of the document can then work on it in the appropriate application.



Check Out

- Left click on a Document that you have write rights to will Check Out the document and open it in its associated application
- Right click on a document and click on Open as Read-Only as shown below if you are not making any changes to the document.
- If the document is checked out other users can open the document as read-only



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Left click on a document that you have write rights to, then select **Open** or double click on the document you want opened, this will **Check Out** the document, and opens the document in its associated application. If no changes are to be made to the document **Open as Read-Only**. **Note:** when the document has been checked out it will be Read only to other users.



Check Out *continued*

- The document is copied to your local ProjectWise caching directory
- The database record is marked checked out, and the document is “locked” and set to read only see the icon below

Name	Description	File Name	Out to
 readme_ProjectWise_Ad...	readme_ProjectWise_Adm...	readme_ProjectWise_Administ...	
 RE Alias E-mail .rtf	RE Alias E-mail	RE Alias E-mail .rtf	ceubanks


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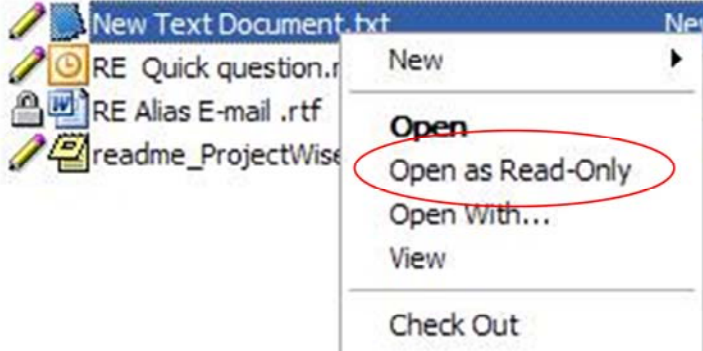
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When the document has been checked out it copies the document to your local ProjectWise caching directory. This allows faster access to the document once it has been copied down. The database file indicates that the document has been checked out, you will see it shown as the check mark icon, all others will see it as the lock icon as shown above.



Open as Read Only

- Allows you to open a document with the application you specify
- Right click on a document and choose **Open as Read-Only** from the pull down menu



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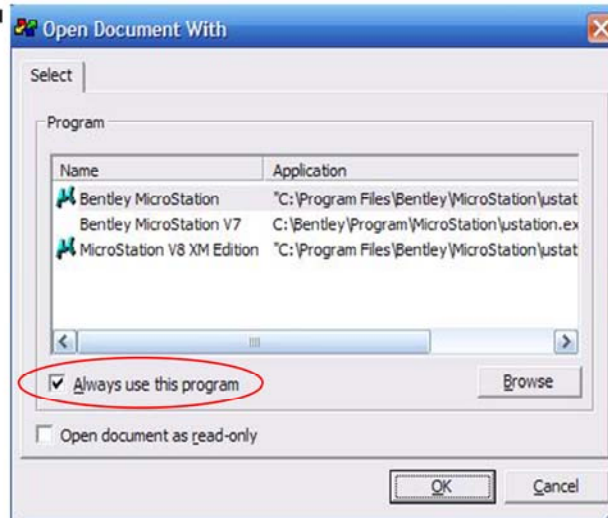
If you only need to read or view the document and not make any changes use the **Open as Read Only**, this allows someone else the right to **Check Out** the document.



Open With

- Allows you to open a document with the application you specify
- Right click on a document and choose **Open With** from the pull down menu

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Use the **Open With** command to select the application you want to work on the document with. By right clicking on the document and choosing the **Open With** command it launches a new menu dialog box that you can select the application from. **Note:** by checking the **Always use this program** check box the file you are working on will open in this application from here on. Also if you do not see the application you want to open the document with select the **Browse** button and search for it. At the bottom of this window you can select the check box to Open document as read-only.



Viewing Documents

- You can use the View command to open a document in read-only mode
- To view a document right click on a document, and select the **View** command

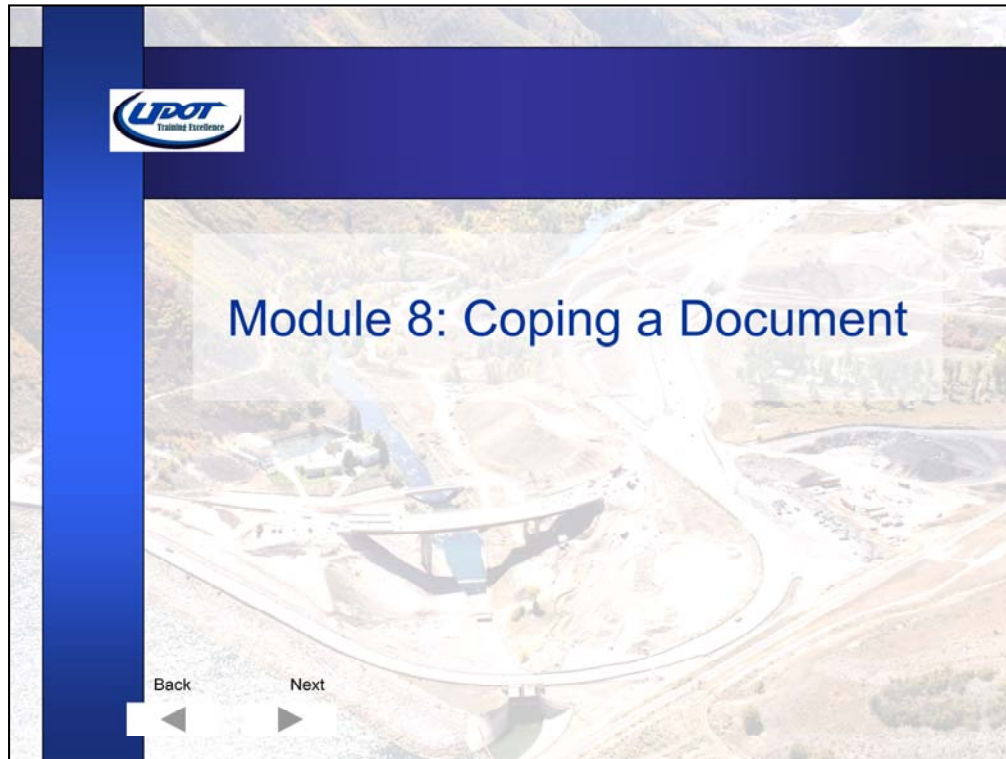


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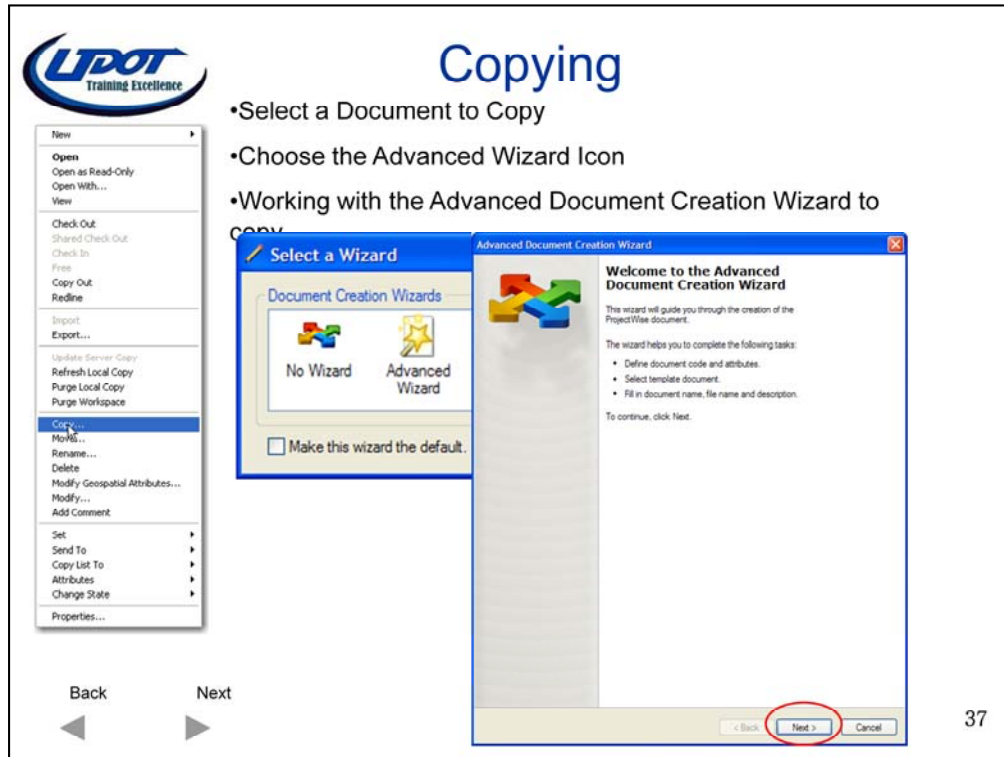
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If you only want to look at a document and not make any changes, you can right click on the document and select the **View** command, this is a read only mode.

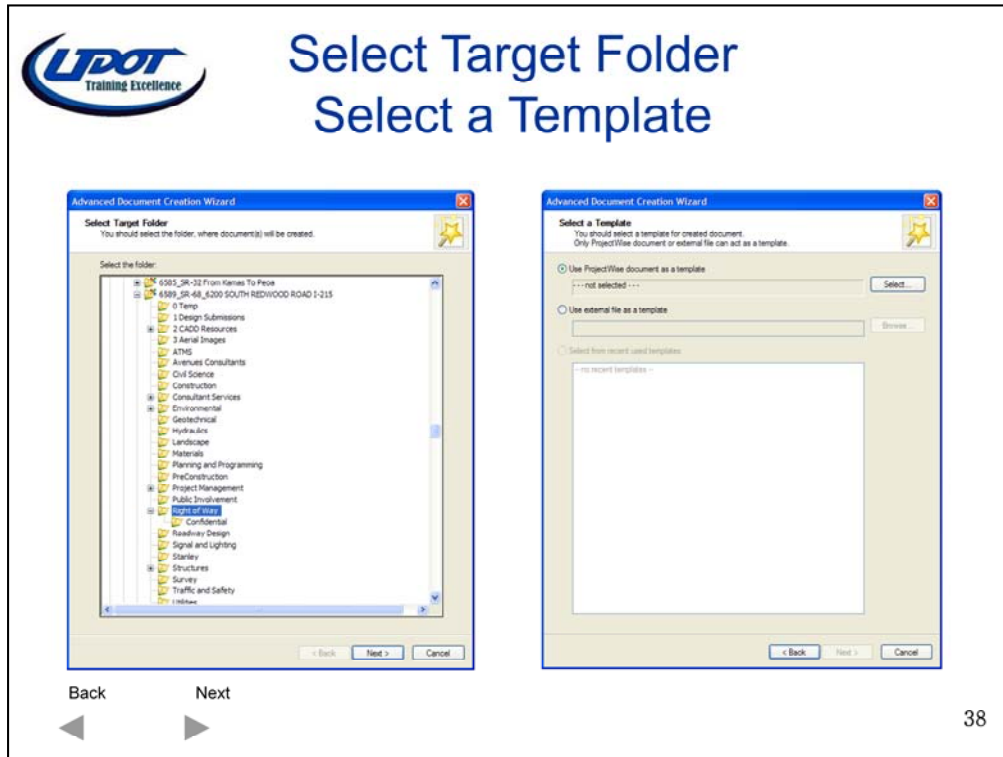
Note: this command opens the document in a ProjectWise Explorer viewer.



The steps for coping a document into ProjectWise Explorer is covered in the following slides.



When **Copying** a document, right click and highlight the document, select the **Copy** command. This launches the **Document Creation Wizard** dialog box, Select the **Advanced Wizard** Icon. In the **Advanced Document Creation Wizard** Dialog box, Click on the **Next** button.



The next dialog box that pops up is the **Select Target Folder** and it allows you to select the folder location to copy the document in. This will default to the location you had highlighted before launching the wizard. **Note:** you need to change the folder location to the location the document needs to be copied to. You can only copy documents to the folders you have rights to.

The **Select a Template** dialog box gives you three options to choose from. Select **Use ProjectWise document as template** when you copy a document from one folder to another folder.



Document Properties

Create a Document

Advanced Document Creation Wizard

Document Properties

Define required document properties - the name and the file name.
Optionally, you can also define document description and version string.

New document name
VZW_Convert_Signed_3-25-05

Description for the new document

New document file name
VZW_Convert_Signed_3-25-05.pdf

Version

Application:
Acrobat PDF

< Back Next > Cancel

[illegible]

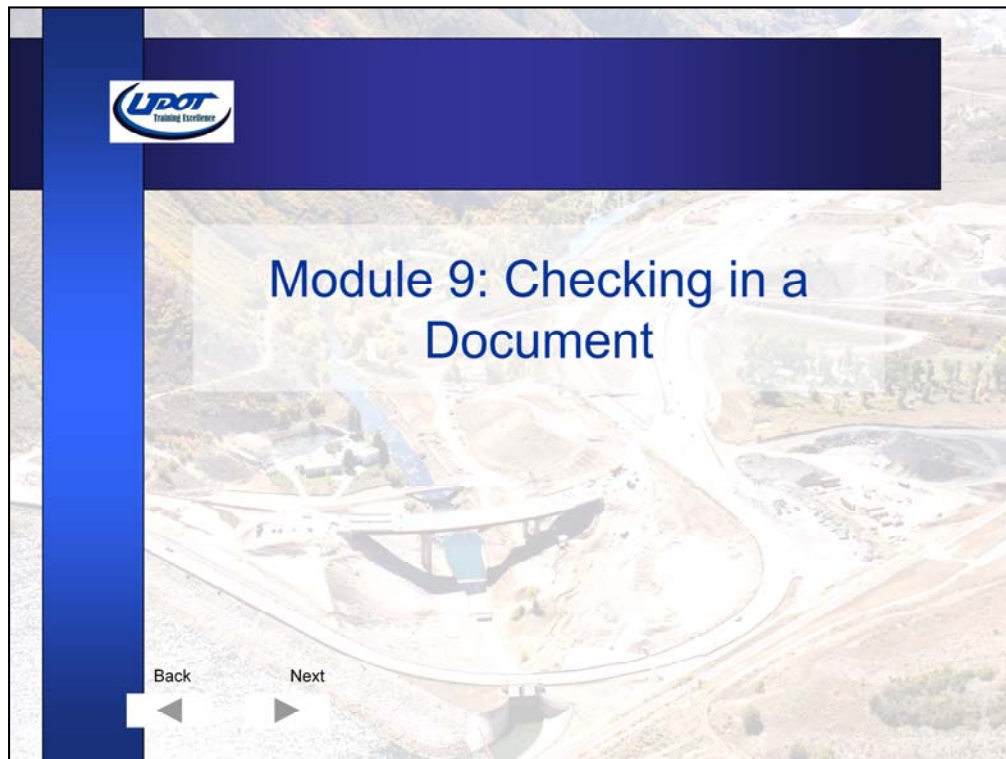
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The next pop up is the **Document Properties** dialog box. In this window you will note that the New Document Name and the New Document File Name has been populated. **Note:** Do not change the document name when copying from one folder to another folder. The **Create a Document** dialog box is the last chance to view the information entered.

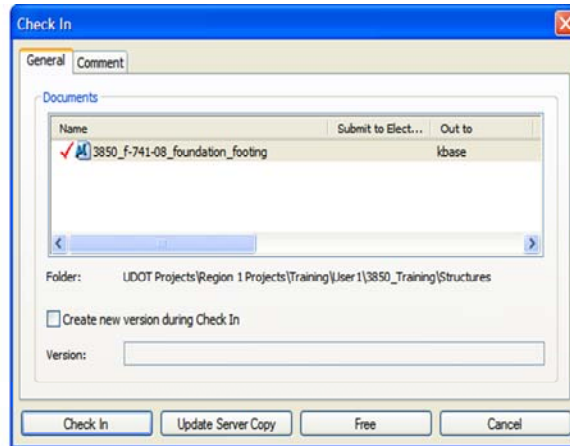


The slides that follow will now take you through the steps to Check in a document that has been checked out of ProjectWise as well as the options when checking it back in.



Check In

- When you are working on a document make sure to save your work and then close the program
- The Check In dialog will appear and within this window you have 4 selections at the bottom of the window




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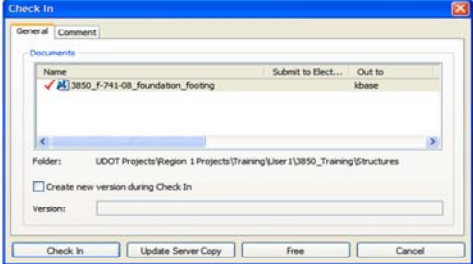
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When finished with a checked out document, save your work, then close the program, this launches the **Check In** dialog box and allows you four choices to select from.



Check In *continued*



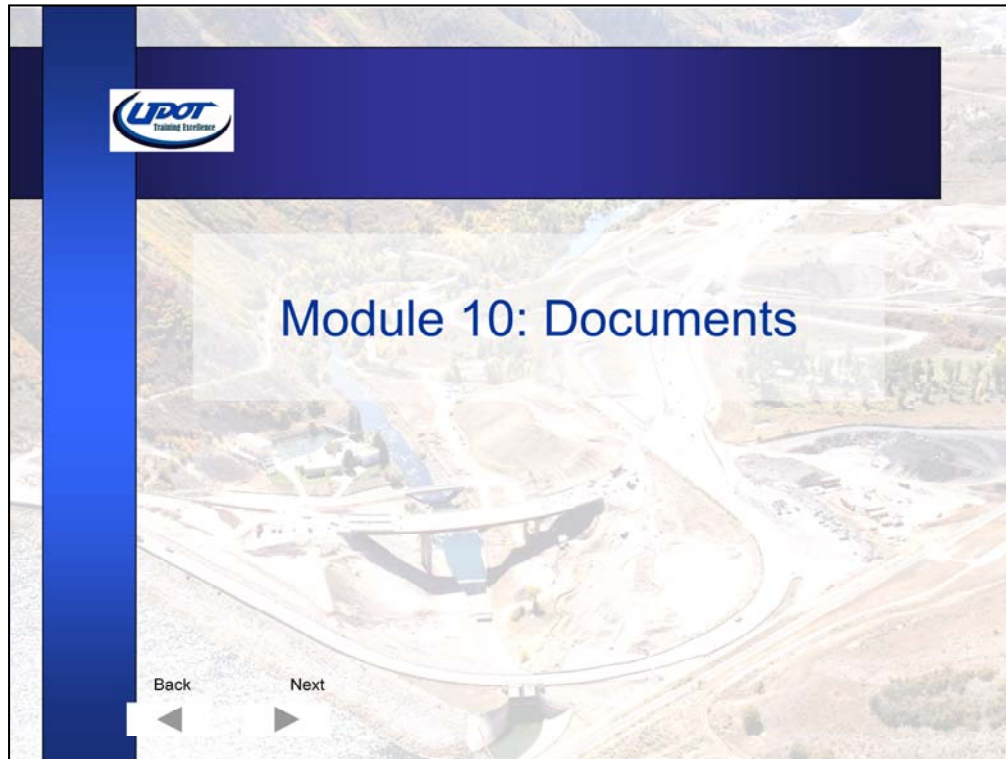
- Check In
 - This allow you to save the work you have completed to ProjectWise
- Update Server copy
 - This updates the Server copy and it allows you to continue to work on the document
- Free
 - This frees the document without saving changes to the server copy
- Cancel
 - It cancels the dialog and returns you to the ProjectWise Explorer without initiating anything

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Your four choices are **Check In**, **Update Server Copy**, **Free**, and **Cancel**. **Check In** allows you to save the work to the ProjectWise Server. **Update Server Copy** leaves the document checked out to you and updates the server copy so others can see the latest changes you've made. Use the **Free** command if the document was checked out and you decided not to make any changes or you made changes and decided not to save the changes. **Note:** The **Free** command acts like the Open as Read Only, just after the fact. The **Cancel** command closes the Check In dialog box and returns you to the ProjectWise Explorer. Nothing will be done to the document.

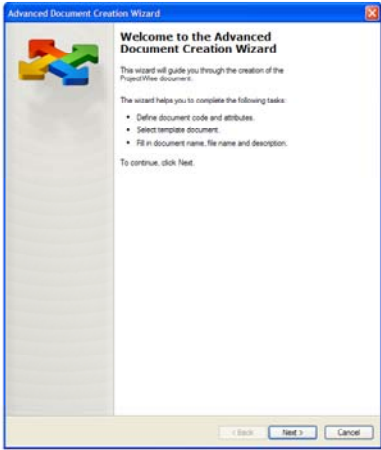


The use of the document Creation Wizard will take you through the steps to create a document in the ProjectWise Explorer over the next few slides.



Document Creation Wizard

- Using the Document Creation Wizard ensures that the required document attributes are properly entered
- The **New > Document** command will launch the Wizard




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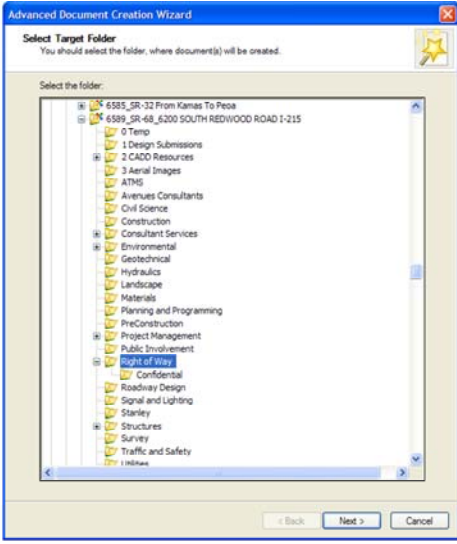
44

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. This allows attributes to be assigned to each document at the time the document is being created. To launch the Advanced Document Creation Wizard, select the **Document** pull down and select **New** then click **Document**. **Note:** you can also select **New>Advanced Wizard...** or right click on an empty space in the document pane and select either **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.




Select Target Folder

- Choose location to place new document



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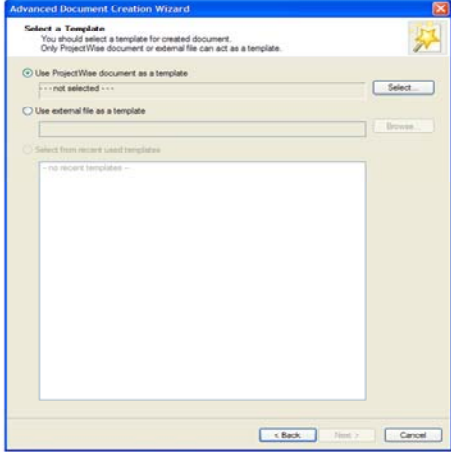
The next dialog box that pops up is the **Select Target Folder** and it allows you to select the folder location to create the document in. This will default to the location you had highlighted before launching the wizard. **Note:** you can change the folder location that you want to create the new document in by selecting another folder, but you can only create documents in the folders you have rights to create in.



Select a Template

Three Options:

- Use ProjectWise document as template
- Use external file as template
- Select from recently used files



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The **Select a Template** dialog box gives you three options to choose from. Select **Use ProjectWise document as template** when you want to start a document based on an existing ProjectWise document, remember that this option will take on all aspects of the template document. Selecting the **Use external file as template** lets you bring in a file that was created outside of ProjectWise without it being over written, if you drag and drop a file into ProjectWise, this option will be selected using the file that you used. The **Select from recently used files** allows you to choose from the past documents that were created using the document wizard.



Document Attributes

- Each document inside of ProjectWise has an assigned environment based on the folder or project that the document resides in
- Attributes defined by the environment store metadata that is associated with the document

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All documents will have some type of **Document Attributes**. The attributes are determined by interface or project that the document resides in. Associated metadata for the document is stored with the document in the ProjectWise Explorer environment, the metadata is determined by the attributes that was given to the document.



Document Attributes *continued*

- All information inside of the attribute window can and will be used to search for documents within ProjectWise
- Note that the **Document Type** attribute is required before you can proceed

The screenshot shows a software window titled "6589 ROW Cert" with tabs for General, Security, Attributes, More Attributes, File Properties, Audit Trail, and Workspace. The "Attributes" tab is active, displaying a "Right of Way" form. The form includes fields for PFI (6589), Project Number (F-0063/431), Route (0063), County (SALT LAKE), and Region (Region 2). The Project Name is "SR-68 6200 SOUTH / REDWOOD ROW". Under the "Interface" section, "Right of Way" is selected. The "Document Type (Req'd)" dropdown is highlighted with a line pointing to the label "Document Type" outside the window. Other dropdowns include "Document Subtype", "Ownership Name", "Panel ID", "TAX ID", "Township", "Range", and "Section". There are also checkboxes for "Mark for Advertisement?", "Mark for Addendum?", and "Mark for Award?". Navigation buttons "Back" and "Next" are at the bottom left, and "Save", "Undo", "Close", and "OK" are at the bottom right.

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The searching capability in ProjectWise Explorer is determined by the attributes assigned to the document. The better you fill in the attributes the stronger the searching capability will be. **Note:** It is required to select a **Document Type**.



Document Subtypes


- Some Document types also have a subtype, these are noted with an **asterisk (*)**

Document Subtype

The screenshot shows a software window titled '6589 ROW Cert' with a tabbed interface. The 'Attributes' tab is active, displaying the 'Right of Way' form. The form contains several sections: 'General' with fields for PIN, Project Number, Route, County, and Region; 'Project Name' with a dropdown; 'Interface' with a dropdown; 'Document Type (Req'd)' with a dropdown; 'Document Subtype' with a dropdown (indicated by an arrow from the text 'Document Subtype'); 'Document Phase' with a dropdown; 'Doc. Multiple Subtype' with a dropdown; 'Organization' with a dropdown; 'Municipality' with a dropdown; 'Submit to Electronic Plan Room' with a dropdown; 'Ownership Name' with a dropdown; 'Parcel ID' with a dropdown; 'TAX ID' with a dropdown; 'Township' with a dropdown; 'Range' with a dropdown; 'Section' with a dropdown; and 'Advertisement Submission' with checkboxes for 'Mark for Advertisement?', 'Mark for Addendum?', and 'Mark for Award?'. At the bottom, there are buttons for 'Save', 'Undo', 'Close', and navigation arrows. The status bar at the bottom right shows '2/3'.

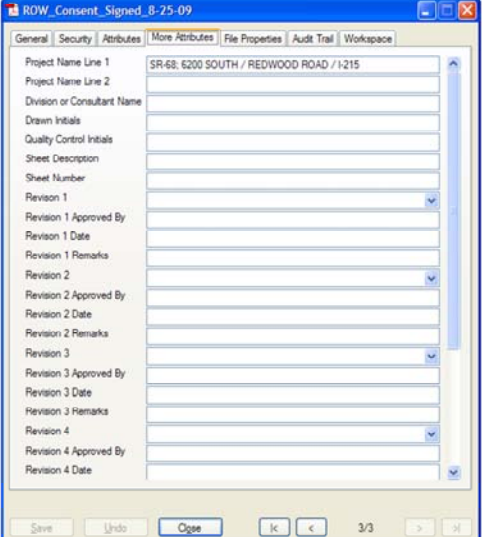
49

There are **Document Subtypes** to some document types, these are indicated by an asterisk following the document type. Remember to fill this category in as well to help with the searching capability if applicable.



More Attributes


- Add additional information on the More Attributes tab



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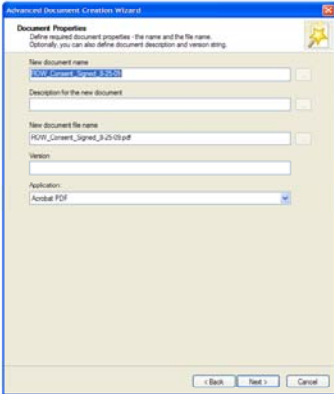
The **More Attributes** dialog box is used to add additional information that pertains to the document. This includes the Interface, Author, Creation Date, and the DOCNUMBER is for converted Hummingbird documents.



Document Properties

At the document properties window enter the following information:

- New Document Name
- Description of Document
- New Document File Name
- Document Name and Document File Name should be the same name



Back
Next

◀
▶

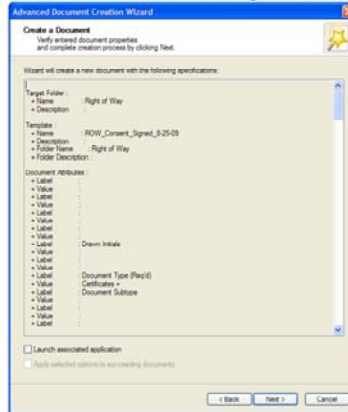
51

The next pop up is the **Document Properties** dialog box. The following information needs to be entered, the **New Document Name** is where the name of the document is entered. **Note:** 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 pre populated). Next is the **Description for the new Document** field and it is optional to fill in any information about the document here. 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. **Note:** Remember the more information that is filled in the better to help with the searching capability.



Create a Document

- This window is the last chance to go back and make changes



- Launch the program associated with the document
- Apply Selected Options to Succeeding Documents

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The **Create a Document** dialog box is the last chance to view the information entered. Use the **Back** button to change any of the previous information that was entered for the document. At the bottom of this dialog box you can choose to Launch the program associated with the document, also there is a check box to Apply Selected Options to Succeeding Documents. **Note:** this check box is useful when multiple documents are being created at one time. **Also Note:** 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). If you choose the Cancel button, it takes you completely out of the document creation process.



The following few slides will walk you through the steps that need to be taken to Create a set file in ProjectWise



Set Files

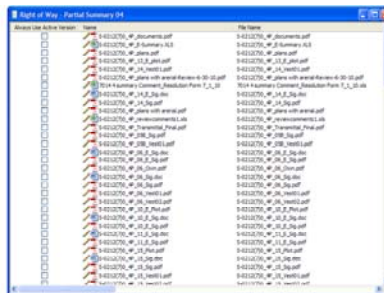
A Set file is indicated by this icon in ProjectWise Explorer



The set file is a group up document when clicked on looks like this

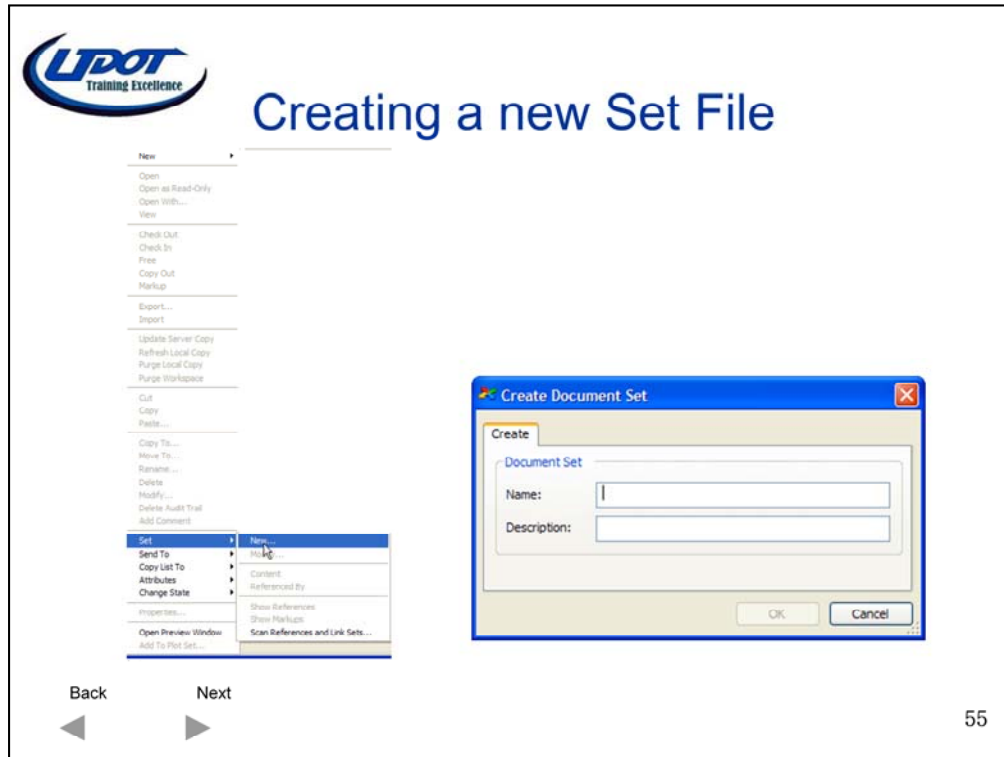
Back

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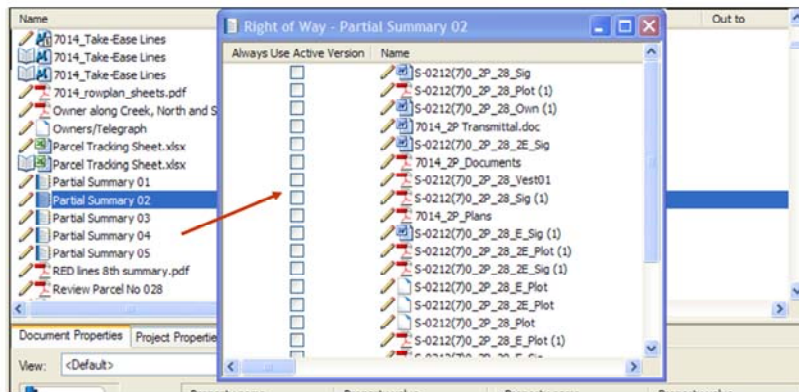
Some software works with groups of files or documents at the same time, such as reference files in MicroStation or embedded files or objects in Microsoft Word. An example is an Excel spreadsheet linked into a MicroStation drawing. To accommodate this, ProjectWise has "Sets.". Users can create, check-out and check-in a set, modify the members of a set, and determine the set a document belongs to.



To create a document set, right click on a document you want to include in the set and select "New" from the list, or select **Set > New** from the Document menu. After you fill out the set name and comment, drag the documents you want in the set from the ProjectWise Explorer to the Document Set window. The documents in the set do not have to be in the same folder.



Adding Files to a Set



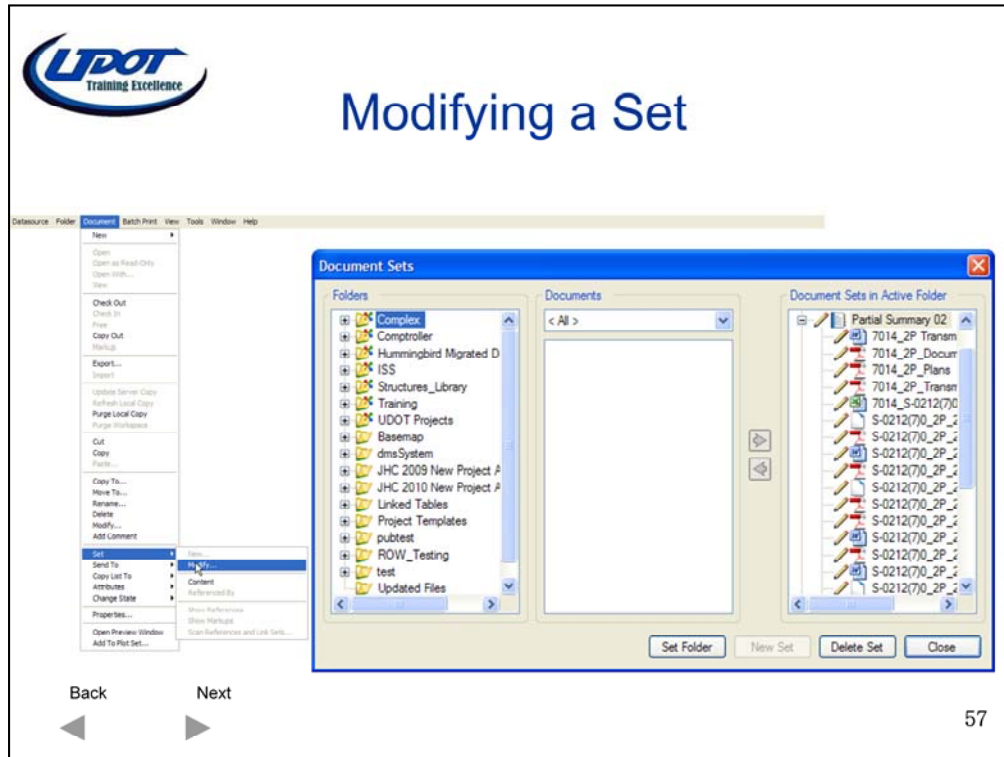
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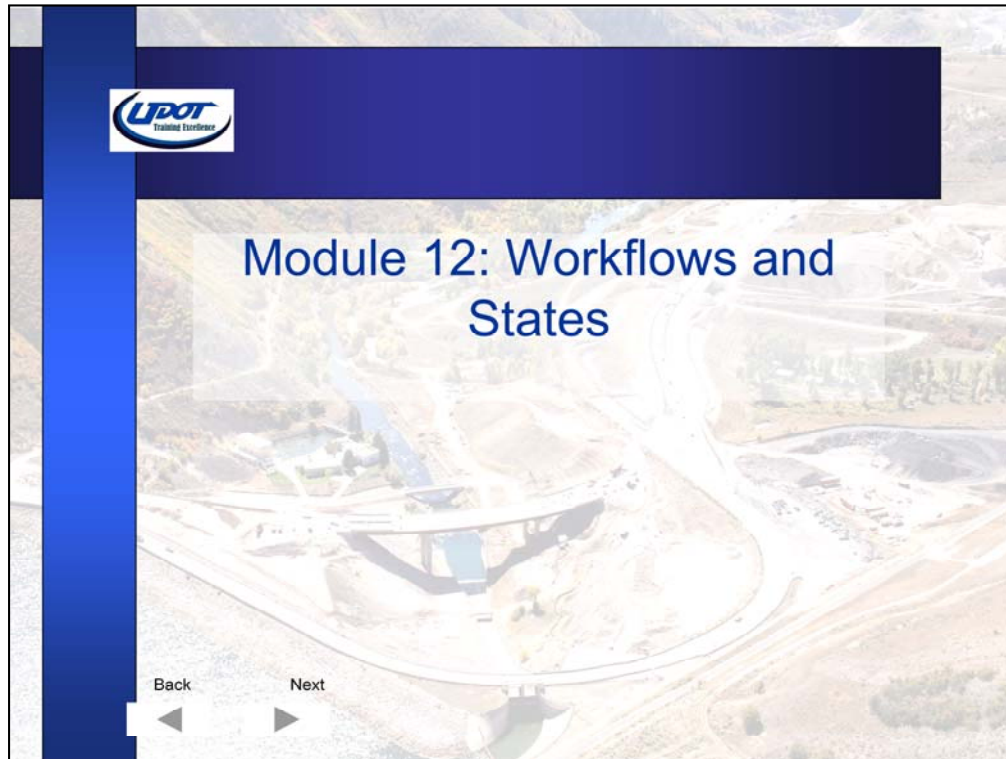


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Drag-and-Drop Operations are used to add files to sets.



There are basically two ways to modify a document set, adding to the set, and removing documents from the set. To modify the contents of a set, right click on the set and select **Set > Modify**. If you want to remove a document from the set, click on the document in the right list and then click on the left arrow between the Document and Document Sets in Active Folder lists. To add to a set, select the folder then the document you wish to add, and then click on the right arrow between the Document and Document Sets in Active Folder lists.



The following few slides will show how to use the Right of Way Workflow using states.



Workflows and States for Right of Way

- Change states to advance the document through the acquisition phases
- Each state changes the document security

FC Full Control CH Change Permissions C Create D Delete R Read W Write CWS Change Workflow State FR File Read FW File Write NA No Access	Right of Way Folder				Acquisitions Folder					
	Access Lists				Access Lists					
	UDOT Project Access	CO_Right of Way	Rel_Right of Way	CSLT_XXX	UDOT Project Access	CO_Right of Way	Rel_Construction	Rel_Project Management	Rel_Right of Way	CSLT_XXX
State										
In Design										
Folder Security	R	R	RW	RW		RW	R	R	R	
Document Security	R/R	R/R	FC	FC		FC				
In Review										
Folder Security	R	R	RW	RW						
Document Security	R/R	R/R	FC	R/R						
In Acquisition										
Folder Security	R	RW	RW	RW						
Document Security	R/R	FC	RW	R/R						
Out for Signature										
Folder Security	R	RW	RW	RW						
Document Security	R/R			R/R						
Executed Documents										
Folder Security										
Document Security										
						RW	R	R	R	
						R/R/CWS				
							R/R	R	R	
							R/R	R/R	R/R	

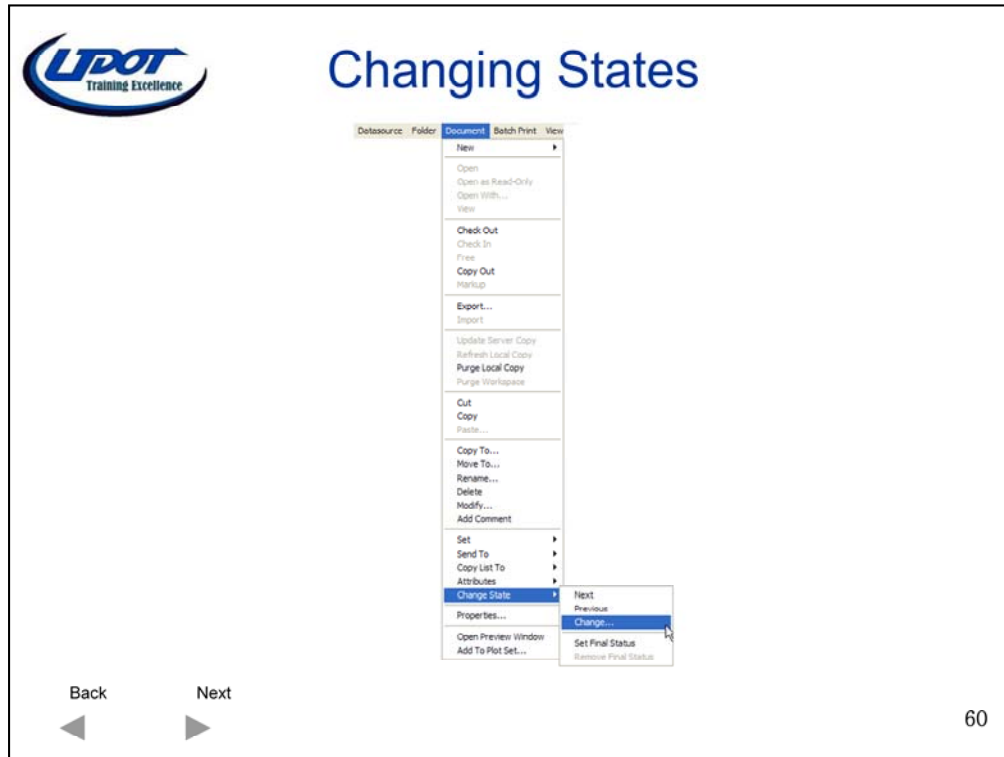
Back

Next

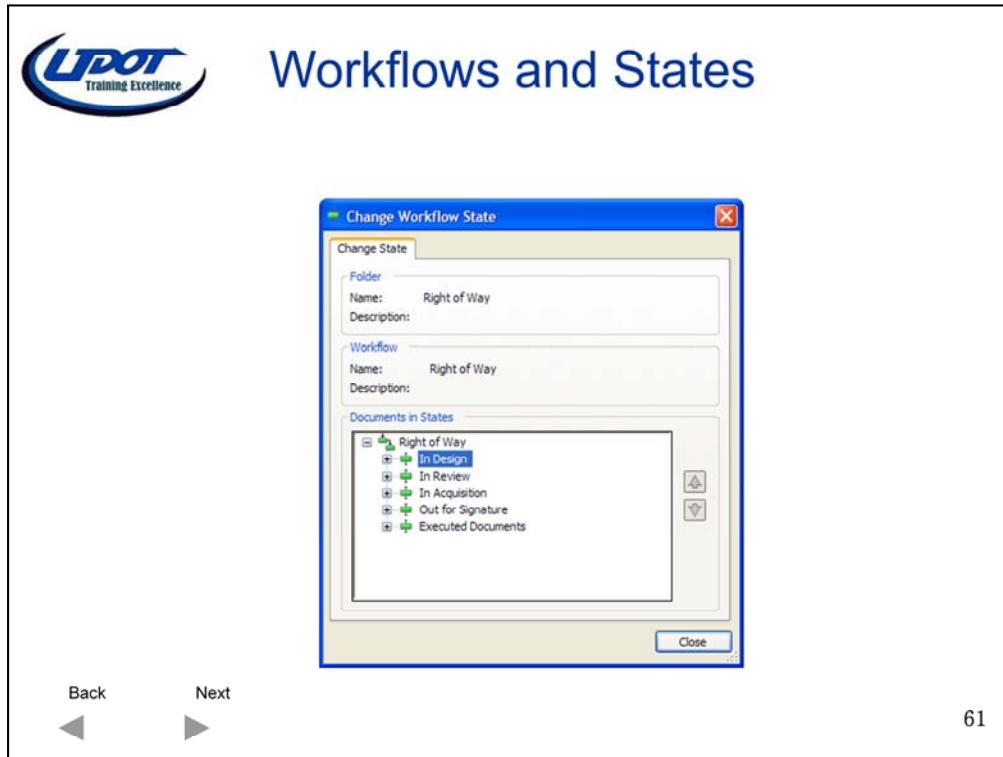


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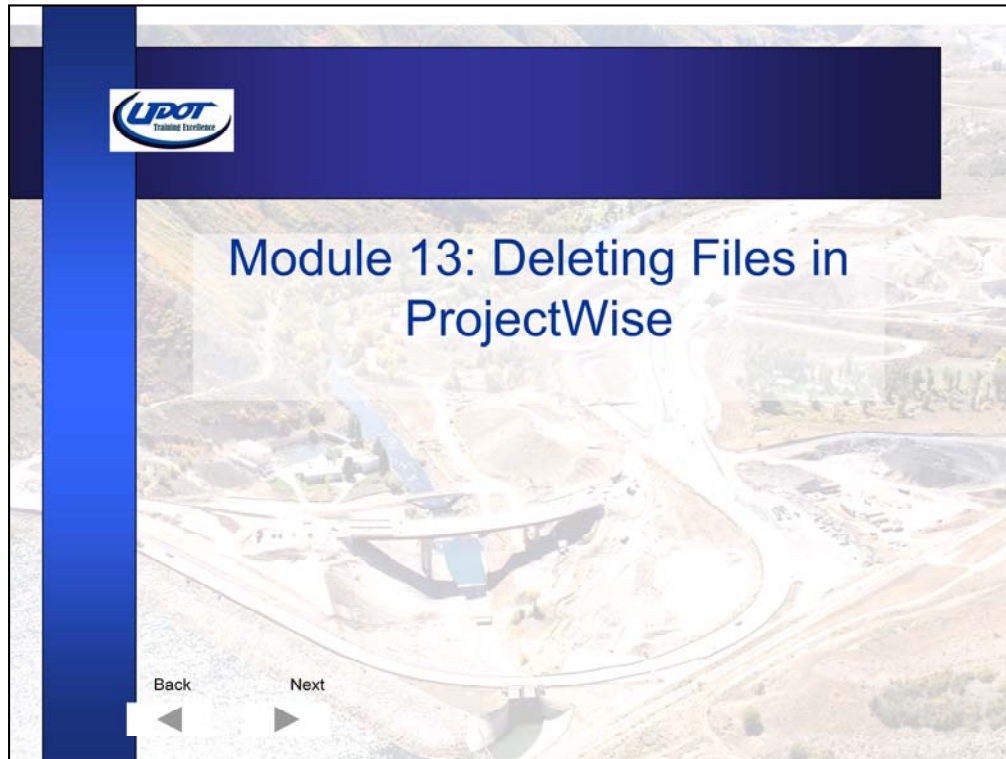
The Right of Way workflow has 5 states that are used, they are In Design, In Review, In Acquisition, Out for Signature, Executed Documents. Each one of these have separate securities assigned to them as needed for the documents to go through the Right of Way Process.




To change Right of Way states, **Right click** on the **document** or **click Document** pull down window and choose **Change State < Change ...** Users can click **Next** or **Previous** if familiar with the current state and workflows.



Document states can be easily managed from the **Change Workflow State** menu. The user must only change the specific desired files.

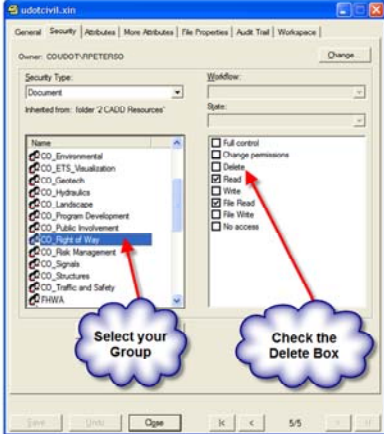


The following few slides will walk you through the steps that need to be taken to Delete your own files in ProjectWise.



Deleting Files in ProjectWise


- To delete a file within the ProjectWise environment **Highlight the Document** then:
- You must go to the **Properties Window > Securities Tab**
- Delete rights** must be assigned to the correct group or person within ProjectWise
- Once the **rights** have been assigned, the file can be removed with the **delete** command



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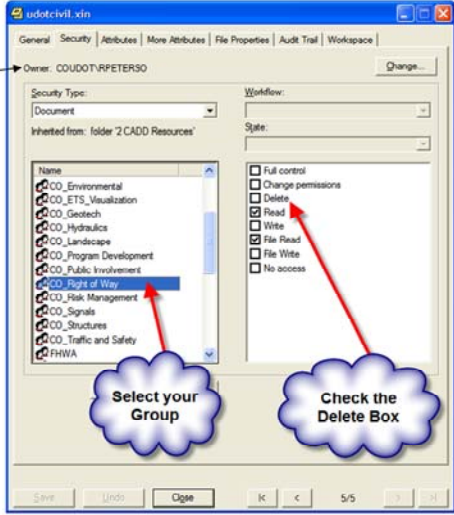
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Deleting Files in ProjectWise is set up in such a way that it prevents anyone from accidentally deleting files that you didn't want deleted. It also eliminates others from deleting your files. **Note:** you can only delete the files that you are the owner or creator of. To delete a file that you are the creator of high light the file, right click and select the **Properties** of the file, select the **Security** tab, in the left side of the dialog box, select the correct group or person in ProjectWise and check the **Delete** box in the right hand side of the dialog box. Once the delete rights have been granted use the standard delete command, right click select **Delete**, this will remove the file from ProjectWise. **Also Note:** once deleted the file is gone, the only way to retrieve the file is to get it from backup tapes.

 **Deleting Files in ProjectWise**
continued

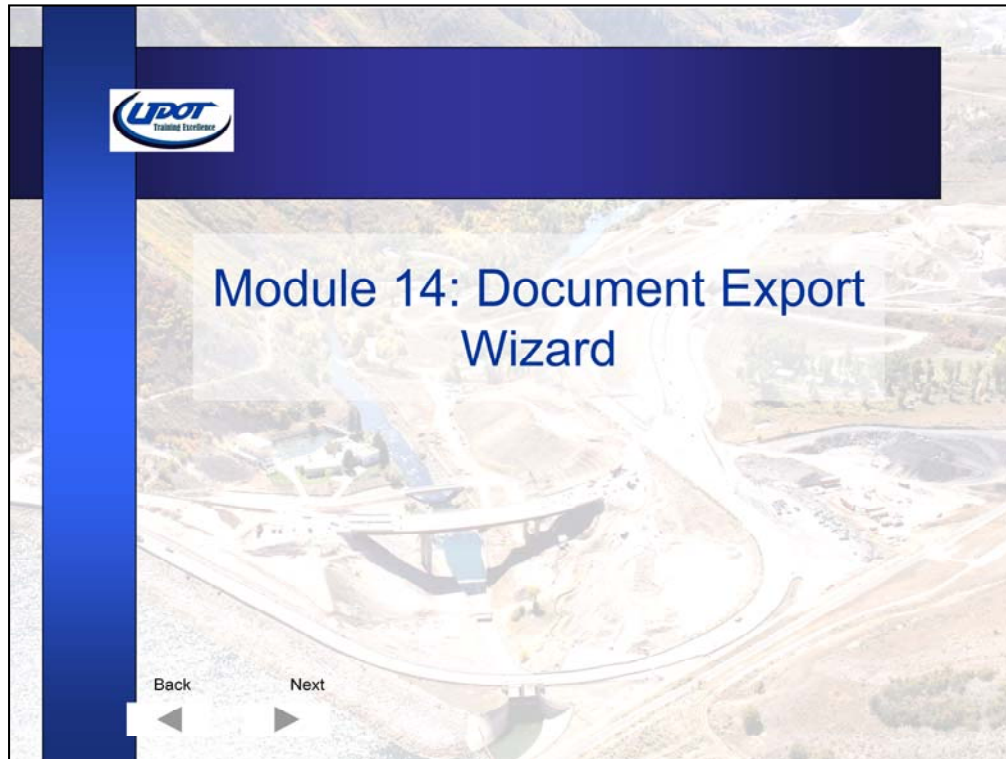
Note: Only Administrators or the document creator can delete the files

Document Creator




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Udot has configured ProjectWise so that only an Administrator or the document owner/creator has the right to delete the file or document. This is to ensure that nobody else can delete documents that they don't own. **Special note:** as a reminder, make sure you only delete the files you want deleted. There is not a recycle bin system in ProjectWise, you will have to get with your IT group to get a tape backup of the document.

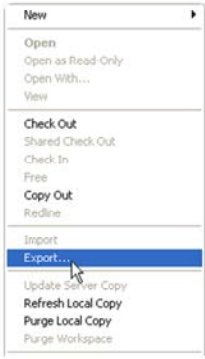


The next few slides will walk you through the options for the use of the Document Export Wizard.




Document Export Wizard

Exporting a file



Select Export...

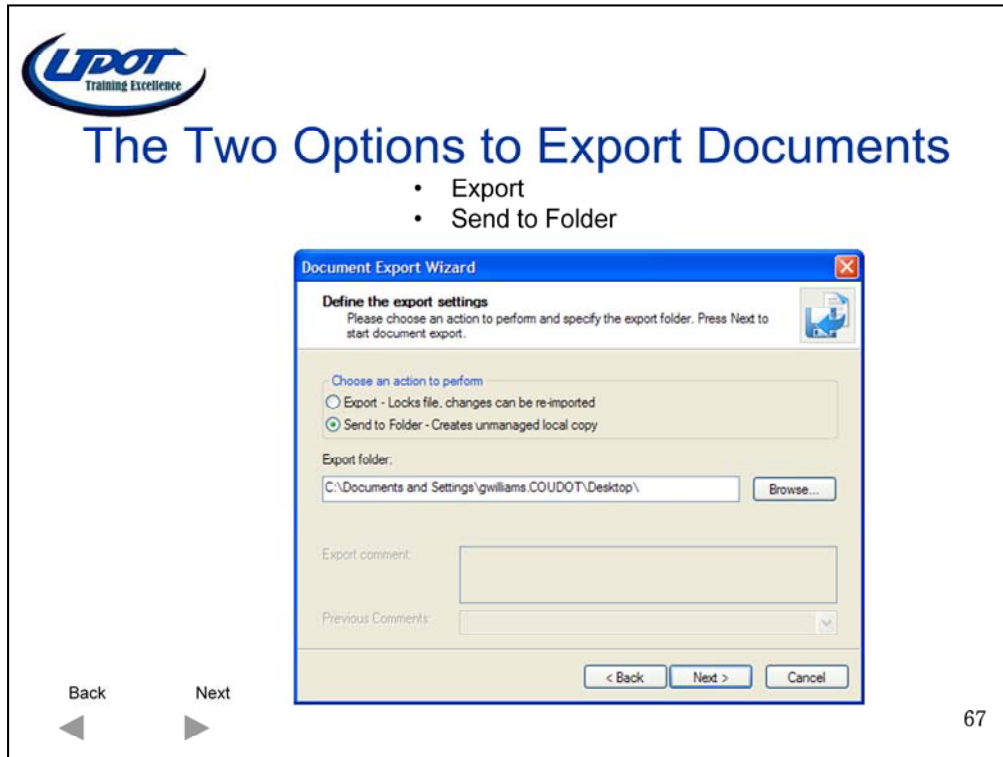
- The export wizard will launch.
- Select Next>



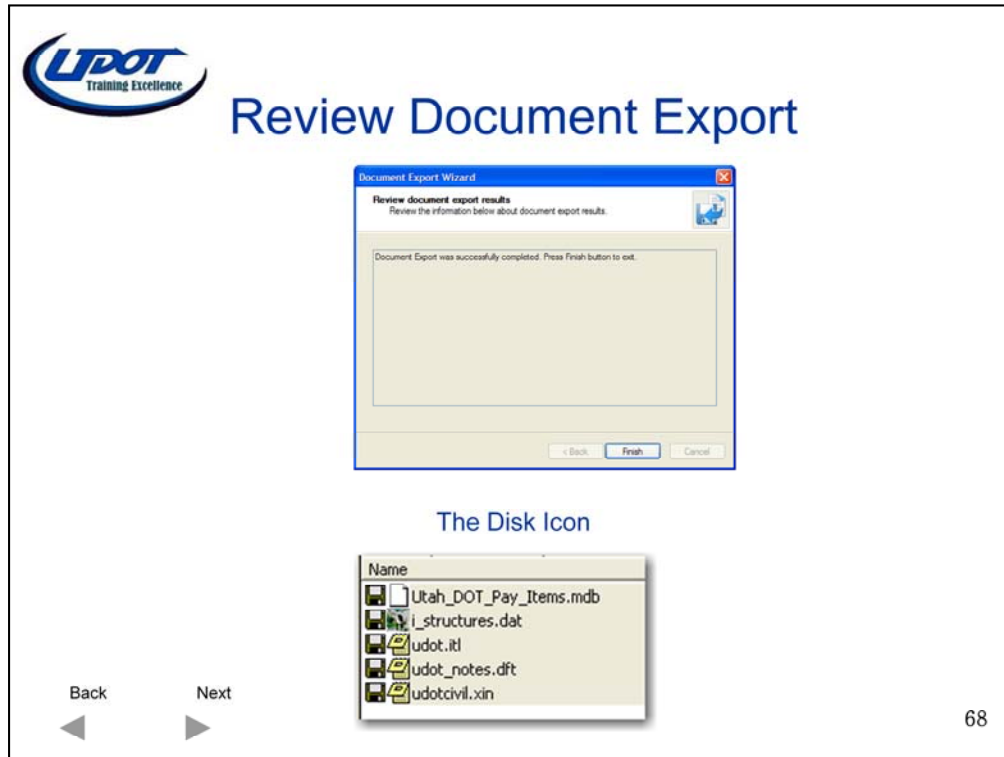
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To export a file, select the file that you want to export and then right click or select the **Document** pull down menu to see the document options.



Using the **Document Export Wizard** allows you to take the file or document outside the ProjectWise environment. For working on a laptop or a computer that does not have access to the ProjectWise environment. The **Export** option locks the ProjectWise document file and the changes made outside of ProjectWise can be re-imported into the ProjectWise environment. The **Send to Folder** option will create an unmanaged copy to a location that you specify. This option keeps the file available for other users that have write rights to the file to work on it inside of ProjectWise. Choose the folder, the files will be copied to by choosing the **Browse** button and selecting the matching folder (unless the files are drawing files) on your local directory structure. Select **Next>** to continue. **Note:** be careful, if you plan on importing the Send to Folder file (the unmanaged copy of the document) you cannot have two files or documents reside in the same folder together with the same name.

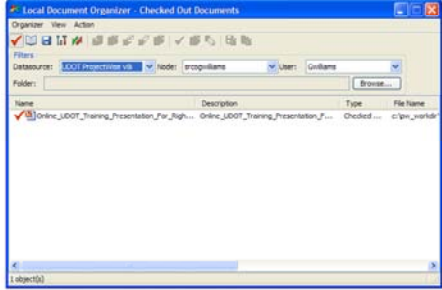


In the **Review document export** dialog box, you can review the export results. Select the **Finish** button and the files will be exported to your local storage structure. Repeat for all files to be exported to your local directory structure. **Note:** Files that have been exported will have a disk icon next to the file name.

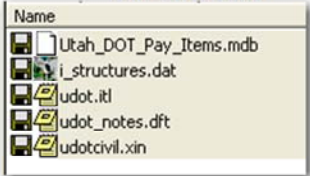


Audit Tab and Local Document Organizer

- Use the audit tab in the Document Properties
- Or use the Local Document Organizer



The Disk Icon



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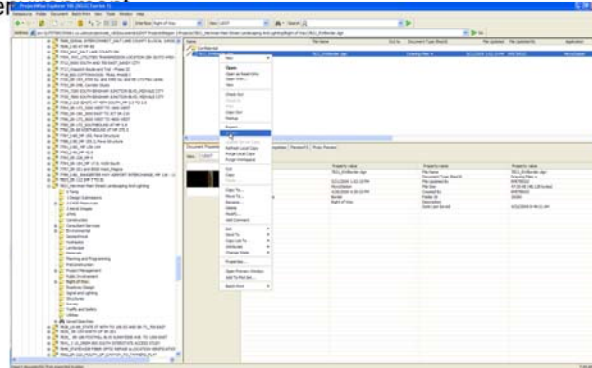
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To view the location where a document was exported to, highlight the file, right click and select the **Properties** of the file, select the **Audit Trail** tab in the document properties or the Local Document Organizer tool. **Note:** the Disk icon shows exported files.



Importing Files that were Exported from ProjectWise

- ProjectWise uses familiar Windows dialog boxes
- Most file formats can reside within the ProjectWise environment



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When **Importing Files** into ProjectWise Explorer that were exported from ProjectWise Explorer, highlight the files to be imported, right click and select the **Import** command. This imports the file back into ProjectWise, a dialog pops up indicating that the files are importing.

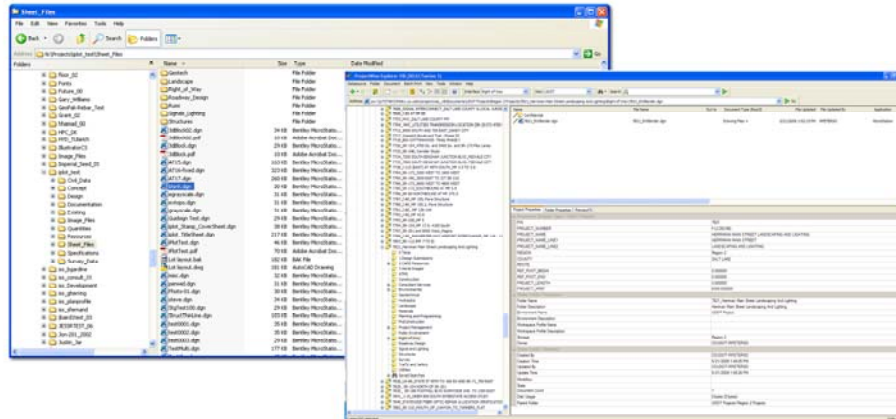


The following slide will show you the procedure to Import documents using a Drag and Drop method.



Drag and Drop Import

- You can save files directly into ProjectWise from non-integrated applications
- Importing files into ProjectWise does not delete the original file

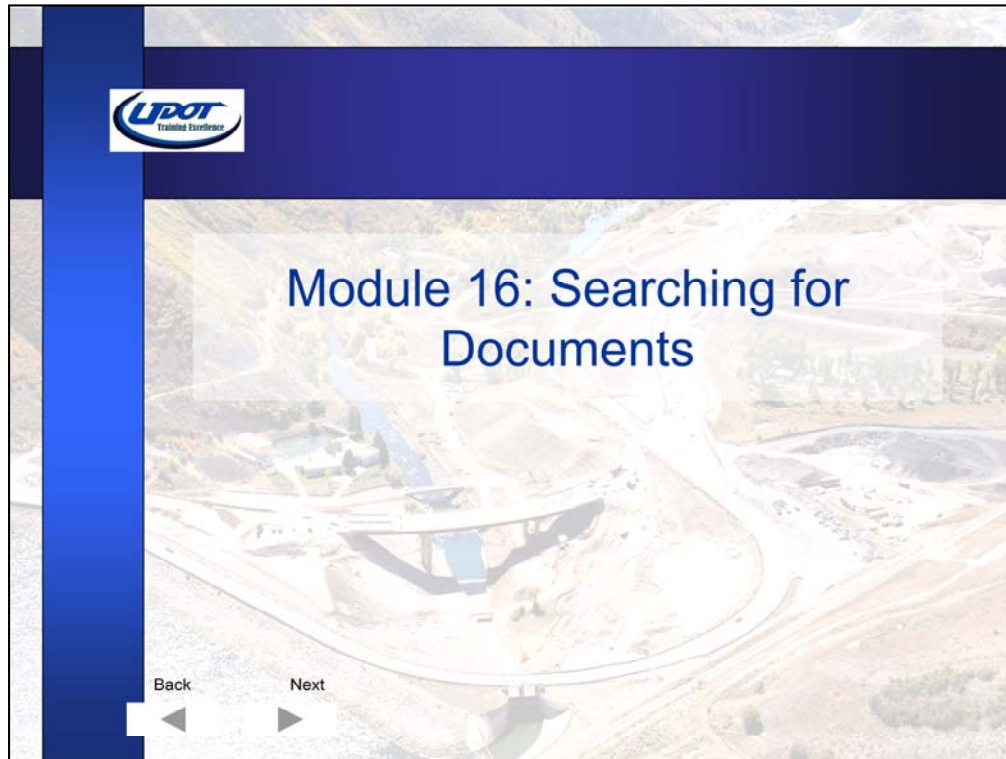


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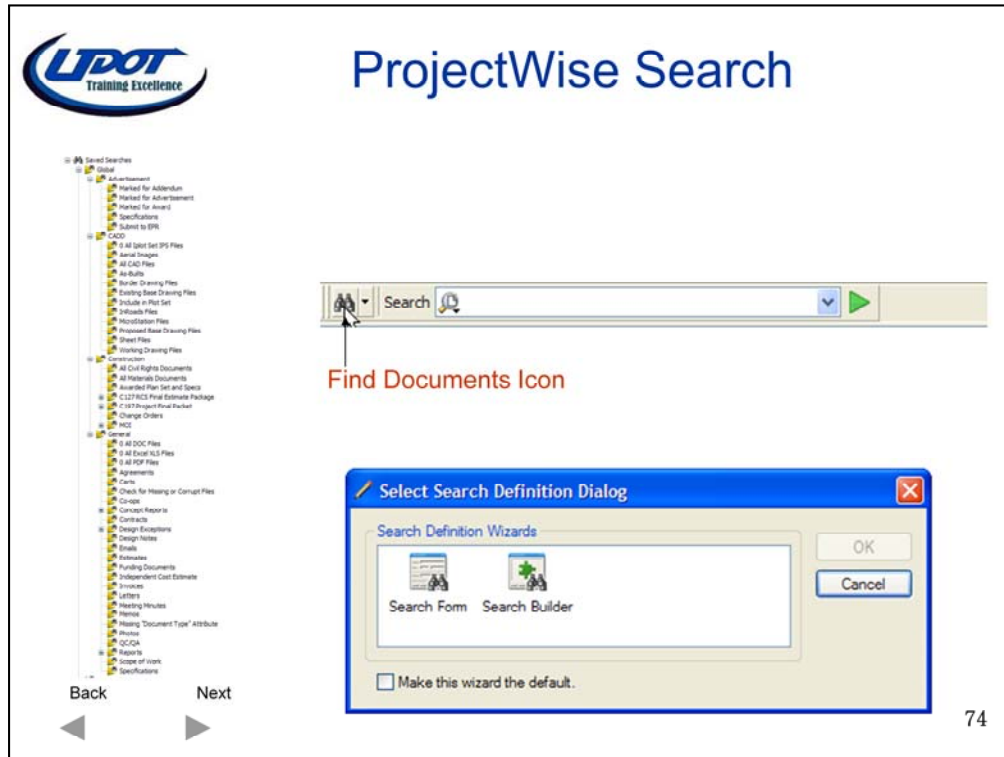
Next

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ProjectWise Explorer does allow non integrated files to be saved directly into the datasourse. Non integrated applications are programs that are not set up to work inside of the ProjectWise Explorer environment. By using the **Drag and Drop** method you can import the file into the ProjectWise Explorer. Select by highlighting the file you want to move into ProjectWise Explorer, hold down the left mouse button and drag the cursor to the folder location you wish to place the file into. Let off the button and the document wizard launches. **Note:** see the section on Document Creation Wizard. **Also note:** using this method will leave the original file in the location that it resides in, as ProjectWise does not delete it.



The following slides show how to use and build searches for the documents that are stored inside of the ProjectWise Environment. The ProjectWise Environment has a great searching capability. The more document attributes that are filled out the better the searching capability will be.



The **ProjectWise Search** feature is a powerful tool that the user can use to find documents inside the ProjectWise Explorer. The searching capability of ProjectWise also allows you to use a **Full Text Search** for documents in formats such as PDFs, DGNs, DWGs, and Microsoft Office applications. The searches are based on information that was input using the attributes for the document when the document was created or updated. *To access the Searching tools you can either go to the project folders **Saved Searches** choose either the Global folder or Personal folder. Global searches are predefined searches that are created with every project. Personal searches are searches that you have created yourself in that project, or you can select the **Find Documents Icon**, and then the **Select Search Definition** dialog box opens, click on either the **Search Form** icon or the **Search Builder** icon.*



Search Form

- The Search Form allows you to find documents based on any attribute such as File Name and Description
- Multiple options can be used at once to refine the search to find only the most relevant documents

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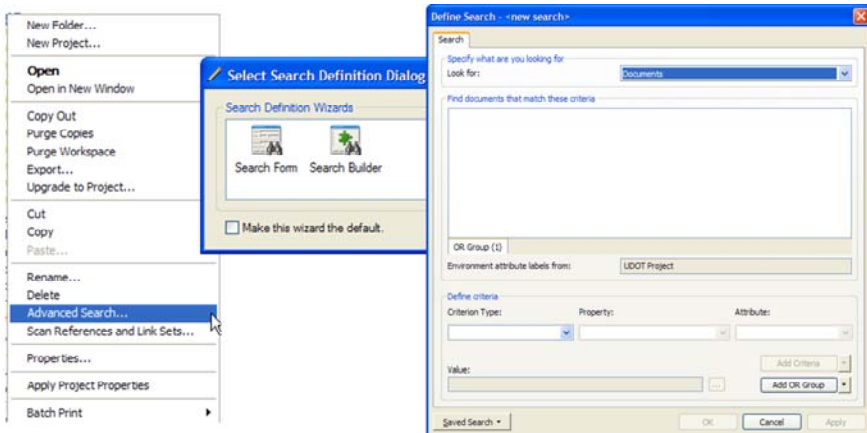
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When you select the search icon, the **Search by Form** dialog box pops up. Within this form you can search for documents based on any attributes that was filled in for the document. The more options you fill in the more refined the search will be.

Search Builder

- The Search Builder allows you to define criteria of a search in order to best locate the documents you are looking for



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The **Search Builder** is a tool that allows you to define the information that builds the best search. To access the search builder, highlight the project folder, right click and select the **Find** command. In the **Select Search Definition** dialog box, select the **Search Builder** icon, this launches the **Define Search** dialog box. You can define what you are looking for by the **Specify what you are looking for**: window, the choices are either **Documents** or **Projects and Folders**. In the **Define Criteria** window there are three pull downs that give you choices to select from. The **Criteria Type**:, the **Property**:, and the **Attribute**:. Select the best items for each of these pull downs. Click the **OK** button to launch the search.



The following slides will explain how to use the predefined projects' Saved Searches.

UPOT
Training Excellence

Saved Searches

- Global
- Personal

Saved Searches

Global

Personal

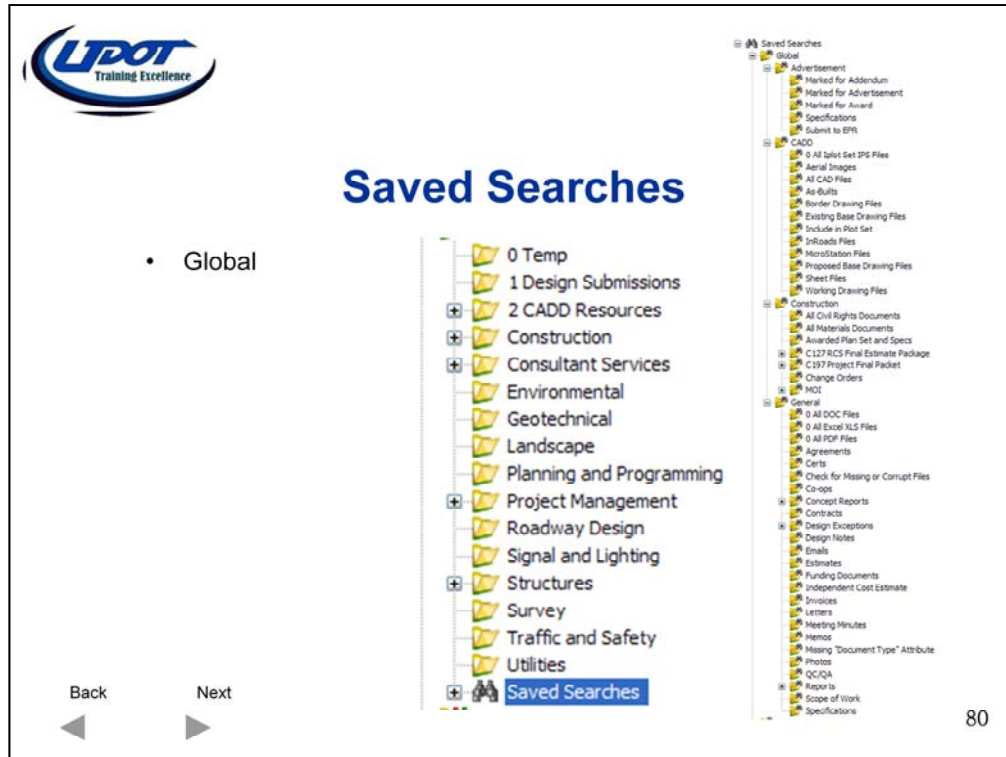
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There are saved searches created for each project. These searches include Global searches and Personal searches. Global searches are imported with the creation of each new project and are consistent from project to project and all users can see all the created searches. The Global searches all have common predefined search information based on the attributes needed to find these documents. Clicking on one of the Global searches will find all the documents that match the criteria that was defined in the saved search.



The following slides will explain how to use the predefined Global Saved Searches for a project.



The Global searches that are available and consisting of predefined attributes saved inside them, these are: Advertisement, CADD, Construction, General. When you click on the search it will find any documents that match the criteria and will automatically be searched upon.



The next slide will explain how to use the predefined projects' Saved Searches.

Saved Searches

- Personal

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Personal searches are ones that users have created for themselves to use and only they will be able to see the searches they have created and saved. Your Custom Searches that you create will be saved in this location.




The following slides will explain how to create your own Custom Searches, and how to save them in to the Personal searching folder.

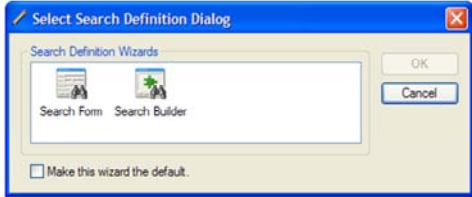


Creating a Custom Search

- Use the Find Documents Icon




- Use the Search Form Icon



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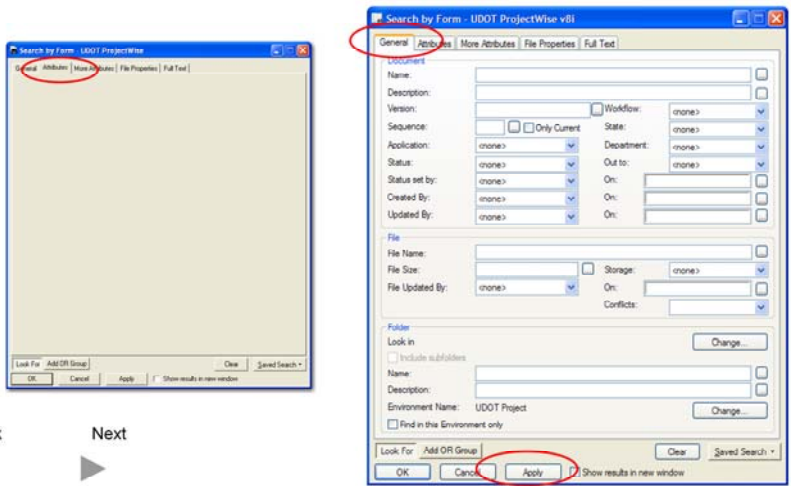
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To Create a Custom Search, Click on the Search Icon in the ProjectWise Explorer. This will bring up the Select Search Definition Dialog box. Select the Search Form Icon and click the OK button.



Creating a Custom Search Cont.


- Search by Form



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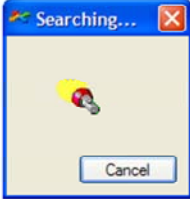
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When the Search by Form first comes up it displays the Attributes tab. Select the General tab to enter the data needed for the search. Fill in any of the fields you want to search on, **Example:** In the Document window fill in the name field, the Description and any other information you may have. Select the application from the pull down menu. If you know who Created it you can select that from a pull down as well as who it was Updated By. When you have filled in all the searching information you have click the Apply Button to see the results of the search.




Creating a Custom Search Cont.

- Searching dialog box




- No documents found



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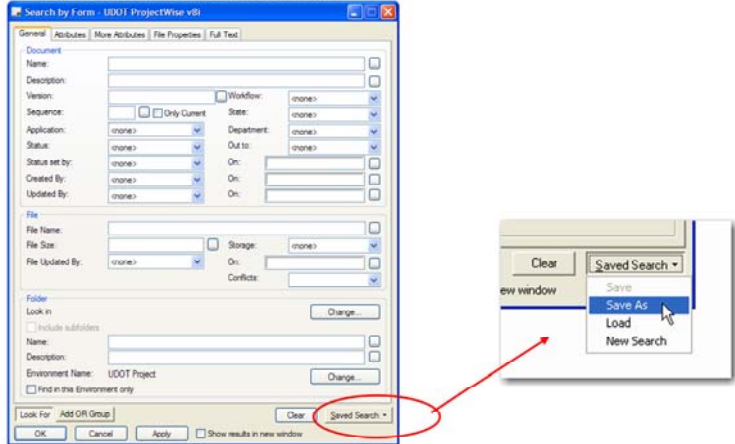
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Once you click on the Apply button, a Searching dialog box appears. This will stay on the screen until the search is completed. If there isn't any documents that match the search criteria that you have filled into the Search form you will get a pop-up letting you know that no documents were found.



Creating a Custom Search Cont.


- Saved Search and Save As



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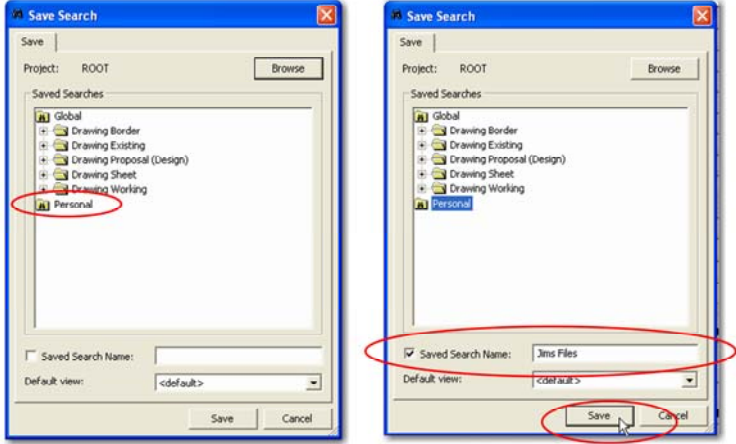
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Click on the Saved Search button at the bottom right side of the Search by Form dialog box, and select Save As.



Creating a Custom Search Cont.

- Saving the Search



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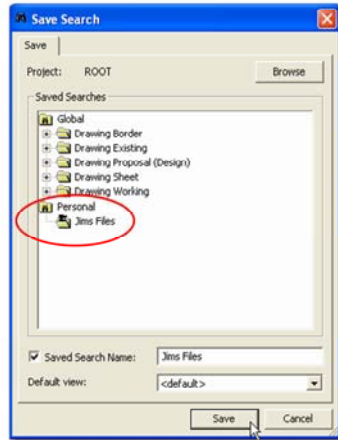
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The Save Search dialog box pops up, select the Personal folder in the Saved Search window. Toward the bottom of the dialog box type in the name and check the Save Search Name check box.



Creating a Custom Search Cont.

- The saved Personal search



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You will notice that the Personal search folder now has a sub folder.



Creating a Custom Search Cont.

- Closing the Search by Form

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Close the Search by Form dialog box by clicking on the Cancel button.



The following slides will explain how to use the Full Text Search capabilities of ProjectWise Explorer.




Full Text Search

- Full Text Search using the Search Building feature

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ProjectWise has Full Text Search capabilities, with this you have the ability to search for specific text inside of documents. These documents include PDFs', DGNs', DWGs' and any type of Microsoft Office file format.

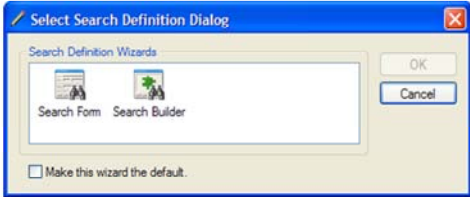


Full Text Search cont.

- Use the Find Documents Icon



- Use the Search Builder Icon



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To use the Full Text Search, Click on the Find Documents Icon in the ProjectWise Explorer. This will bring up the Select Search Definition Dialog box. Select the Search Builder Icon and click the OK button.



Full Text Search cont.

- Define Search - <new search> dialog box


A screenshot of the 'Define Search - <new search>' dialog box. The dialog has a title bar with the text 'Define Search - <new search>'. Inside, there is a 'Search' tab. Below the tab, there is a text field labeled 'Specify what are you looking for' with the text 'Look for:' and a dropdown menu showing 'Documents'. Below this is a large empty text area labeled 'Find documents that match these criteria'. Below the text area is a section labeled 'OR Group (1)' with a text field 'Environment attribute labels from:' and a dropdown menu showing 'Doc Types'. Below this is a section labeled 'Define criteria' with three columns: 'Criterion Type:', 'Property:', and 'Attribute:'. Each column has a dropdown menu. Below these columns is a 'Value:' text field. To the right of the 'Value:' field are two buttons: 'Add Criteria' and 'Add OR Group'. At the bottom of the dialog are three buttons: 'Saved Search', 'OK', 'Cancel', and 'Apply'.

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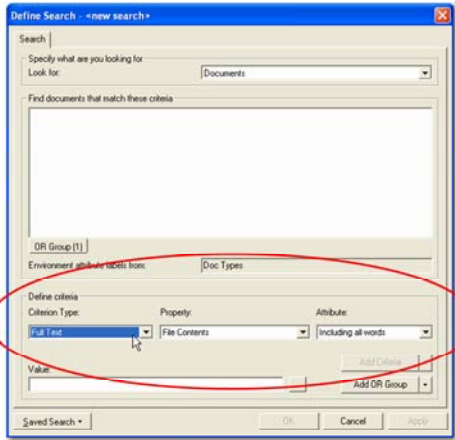
94

This brings up the Define Search - <new search> dialog box.



Full Text Search cont.

- Define Criteria window



Select Criterion Type from pull down

Select from Property pull down

Select from Attribute pull down

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In the Define Criteria window, select **“Full Text”** in the Criterion Type pull down, select **“File Contents”** in the Property pull down, and **“Including All Words”** in the Attribute pull down.



Full Text Search cont.

- Define Search - <new search> dialog box

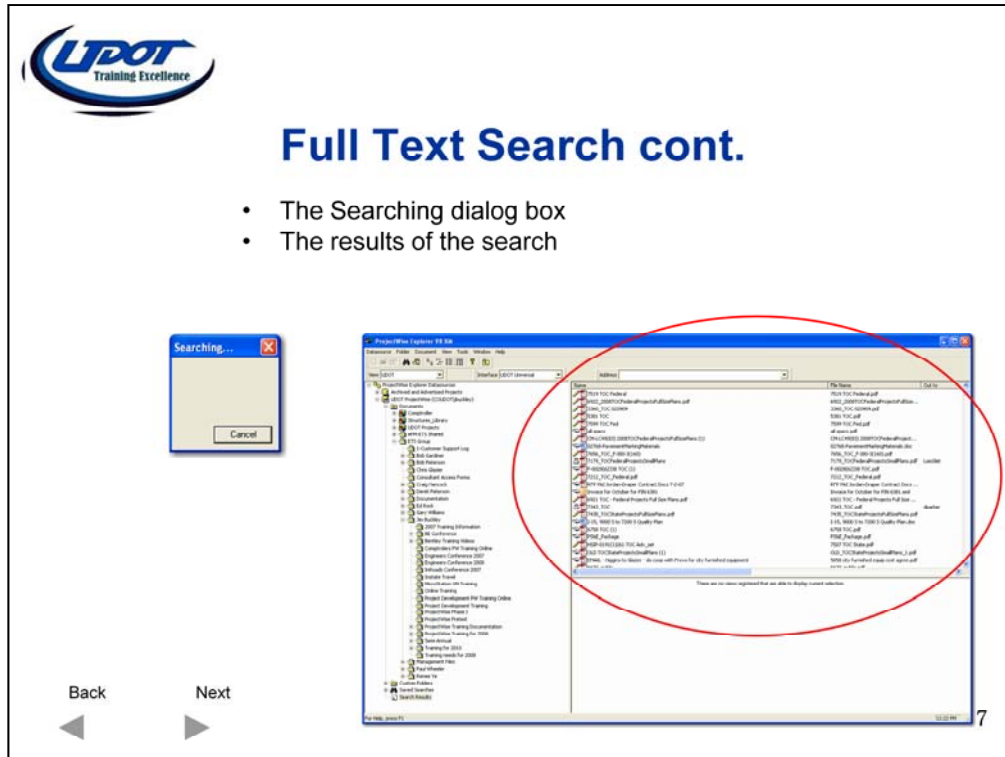
Define criteria dialog box. It contains three dropdown menus: Criterion Type (set to Full Text), Property (set to File Contents), and Attribute (set to Including all words). Below these is a Value field with the placeholder text "Add your text here". To the right of the Value field are two buttons: "Add Criteria" and "Add OR Group". At the bottom are buttons for "Saved Search", "OK", "Cancel", and "Apply". Red circles highlight the Value field and the "Add Criteria" button.

Define Search - <new search> dialog box. It has a "Search" tab and a "Look for" dropdown set to "Documents". Below this is a text area with the text "Find documents that match these criteria" and "Test in File Contents, Including all words: 'Add your text here'". A "Back" button is on the left. Red circles highlight the "Look for" dropdown and the text area. Navigation arrows are at the bottom left.

Attribute dialog box. It shows the "Attribute" dropdown set to "Including all words". Below it are "Add Criteria" and "Add OR Group" buttons. At the bottom are "Cancel" and "Apply" buttons. A red circle highlights the "Apply" button.

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In the Value data field, type in what you want to search for, this can either be all of the phrase or just a portion of it. Wild cards are also accepted as part of the text. Click on the Add Criteria button. This will now fill in the **Find documents that match these criteria** window. Click the Apply button.



After clicking the Apply button a small Searching dialog box appears and you have a chance to Cancel the search or let it continue. After ProjectWise finishes the search, close the Search Builder to see the results in ProjectWise.



The next few slides will explain what options are available when using the Search Builder.



Search Builder Options

- Options in the Define Criteria window

Define criteria

Criterion Type:

Property:

Attribute:

Value:

Add Criteria


Add OR Group

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The attributes that were assigned to the file when a document was created or moved into ProjectWise is what you will be Searching on using the Search builder tool. To make the searches in ProjectWise easier for the users there are areas to select various attributes. The first is the Criterion Type: pull down, next is Property: pull down and then the Attribute: pull down. Once you select from first the Criterion Type this will populate the next selection set the Property pull down.

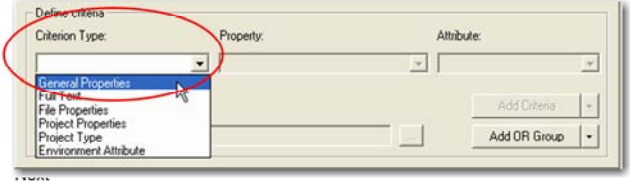


Search Builder Options cont.

- Define the Criterion Type




Example: Criterion type of General Properties



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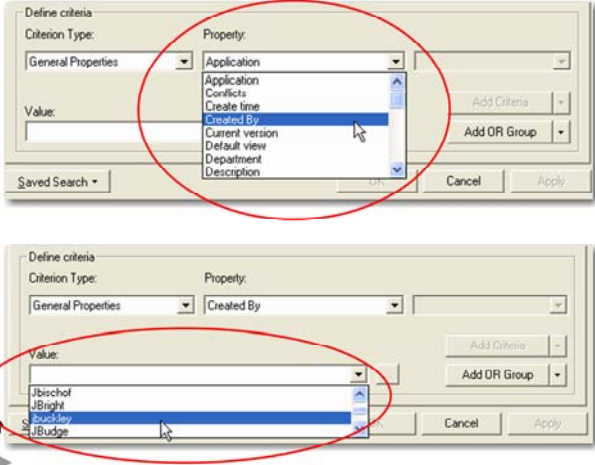
100

In the Criterion Type pull down search field there are several options of searching to choose from. By selecting anyone of these choices it will populate the Property pull down search field. Example: if the General Properties option is selected it will populate the Property field with a wide variety to choose from.



Search Builder Options cont.


- Select the Property field



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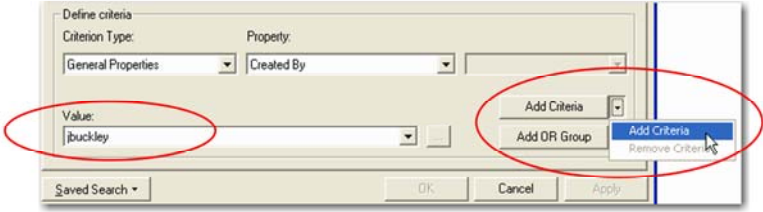
101

In the Property field pull down select your next search attribute. Example: if Created By is selected, you now will select the name of the document creator, which in turn will search the ProjectWise database and show all the documents created by the name selected.



Search Builder Options cont.


- Select the Value field and Add Criteria



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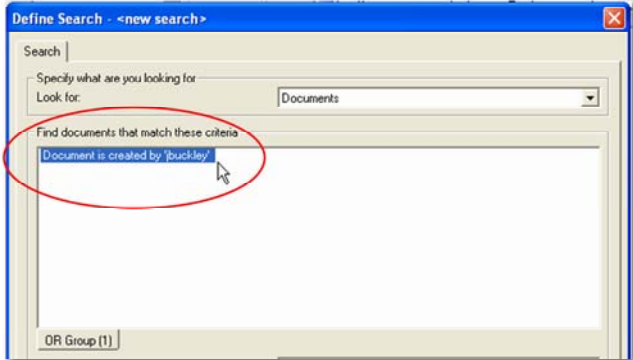
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Once you have selected the Value field, you now select the Add Criteria button to the right of the dialog box.



Search Builder Options cont.


- Find Documents that match these criteria window



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This will populate the Find documents that match these criteria window field toward the top of the Define Search dialog box.



Search Builder Options cont.


- Click the Apply button to start the search



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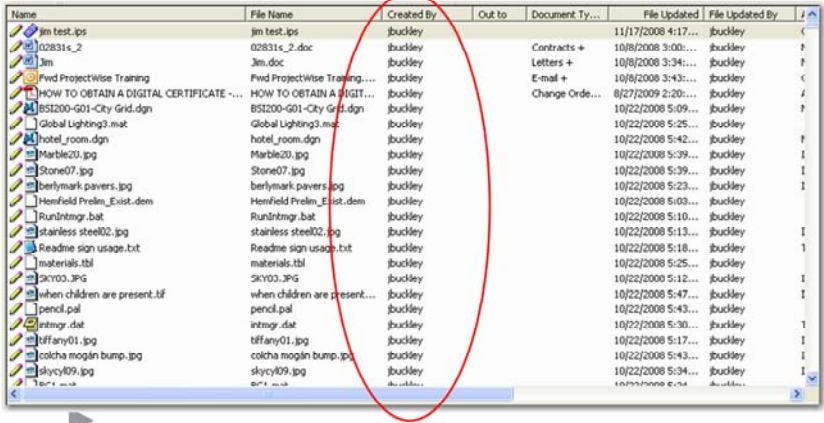
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Start the search by clicking the Apply button. The Searching dialog box pops up and at this point you can select the Cancel button to stop the search or let it gather all the documents you have defined with the attributes you have selected for the search.



Search Builder Options cont.

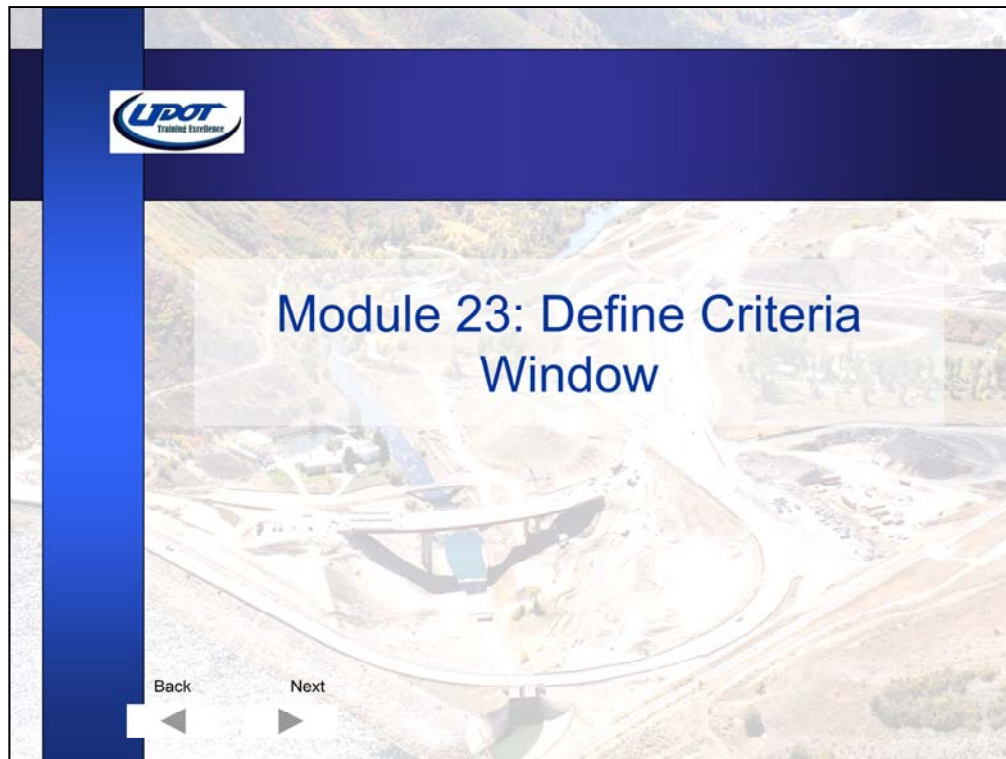
- The Search results in the Document pane




Name	File Name	Created By	Out to	Document Ty...	File Updated	File Updated By
jm test.jpg	jm test.jpg	jbuckley			11/17/2008 4:17...	jbuckley
02831c_2	02831c_2.doc	jbuckley		Contracts +	10/8/2008 3:00...	jbuckley
jm.doc	jm.doc	jbuckley		Letters +	10/8/2008 3:34...	jbuckley
Pwd ProjectWise Training	Pwd ProjectWise Training....	jbuckley		E-mail +	10/8/2008 3:43...	jbuckley
HOW TO OBTAIN A DIGITAL CERTIFICATE ...	HOW TO OBTAIN A DIGIT...	jbuckley		Change Orde...	8/27/2009 2:20...	jbuckley
851200-G01-City Grd.dgn	851200-G01-City Grd.dgn	jbuckley			10/22/2008 5:09...	jbuckley
Global Lighting3.mat	Global Lighting3.mat	jbuckley			10/22/2008 5:25...	jbuckley
hotel_room.dgn	hotel_room.dgn	jbuckley			10/22/2008 5:42...	jbuckley
Marble03.jpg	Marble03.jpg	jbuckley			10/22/2008 5:39...	jbuckley
Stone07.jpg	Stone07.jpg	jbuckley			10/22/2008 5:39...	jbuckley
berlymark pavers.jpg	berlymark pavers.jpg	jbuckley			10/22/2008 5:23...	jbuckley
Hemfield Prelim_Exist.dwg	Hemfield Prelim_Exist.dwg	jbuckley			10/22/2008 5:03...	jbuckley
RunIntmgr.bat	RunIntmgr.bat	jbuckley			10/22/2008 5:10...	jbuckley
stainless steel02.jpg	stainless steel02.jpg	jbuckley			10/22/2008 5:13...	jbuckley
Readme sign usage.txt	Readme sign usage.txt	jbuckley			10/22/2008 5:18...	jbuckley
materials.tbl	materials.tbl	jbuckley			10/22/2008 5:25...	jbuckley
SKY03.JPG	SKY03.JPG	jbuckley			10/22/2008 5:12...	jbuckley
when children are present.tif	when children are present...	jbuckley			10/22/2008 5:47...	jbuckley
pencil.pal	pencil.pal	jbuckley			10/22/2008 5:43...	jbuckley
intmgr.dat	intmgr.dat	jbuckley			10/22/2008 5:30...	jbuckley
tiffany01.jpg	tiffany01.jpg	jbuckley			10/22/2008 5:17...	jbuckley
colcha moglin bump.jpg	colcha moglin bump.jpg	jbuckley			10/22/2008 5:43...	jbuckley
skycy09.jpg	skycy09.jpg	jbuckley			10/22/2008 5:34...	jbuckley

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The Search result based on the criteria of Created By jbuckley are displayed in the document pane of ProjectWise Explorer. This will show all the documents that are in the ProjectWise Explorer Document Management system and have been created by jbuckley.




The next few slides will explain what options are available in the Define Criteria window.

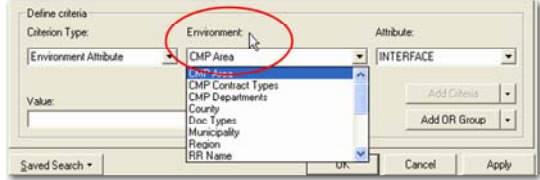


The Define Criteria window

- Depending on the Criterion Type selected




- The second pull down window populates



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Depending on which Criterion Type you've selected, you will get a different set of options to choose from in the second pull down. The titles for the second pull down include Property, Property Set, Type and Environment. Each of these have a wide range of attribute choices to select from in the pull down under the second window. Notice in the bottom graphic that the second pull down window has changed from the Property selection to the Environment selection, this is because of the Criterion Type was changed to the Environmental Attribute.



The Define Criteria window


- Examples of the third pull down menu



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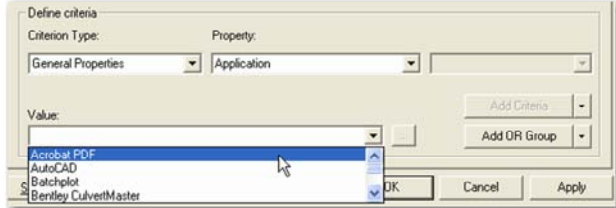
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The third pull down menu populates depending on the first and second pull down selections that you make. Here are the three types that you will see as your selections change to the first and second pull downs. There is a blank pull down, a Property pull down and an Attribute pull down.



The Define Criteria window


- The Value window and pull down



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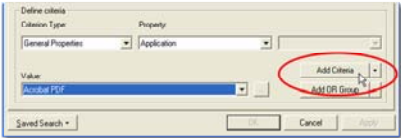
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The Value pull down has predetermined data that you can select from. This will help narrow down your search. Depending on what is selected in the first two or three pull downs will determine what the **Value:** pull down will populate with.

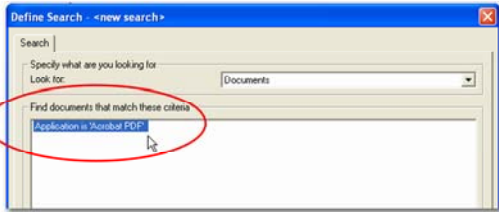


The Define Criteria window

- Add Criteria button




- The Find documents that match these criteria



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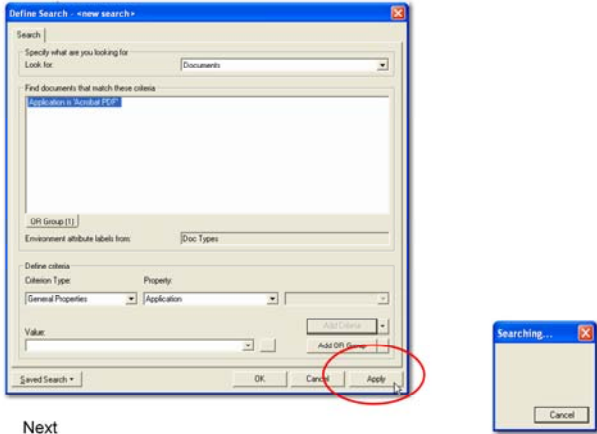
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Once the Value pull down has been selected Click on the Add Criteria button to add the value to the Find documents that match these criteria window.



The Define Criteria window


- Select the Apply button



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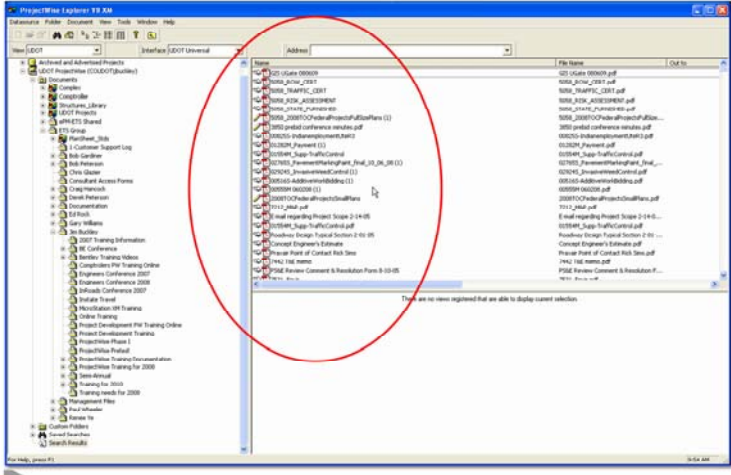
111

Click on the Apply button to start the search, a small Searching dialog box appears and you have a chance to Cancel the search or just let it continue.



The Define Criteria window

- Results of the Search

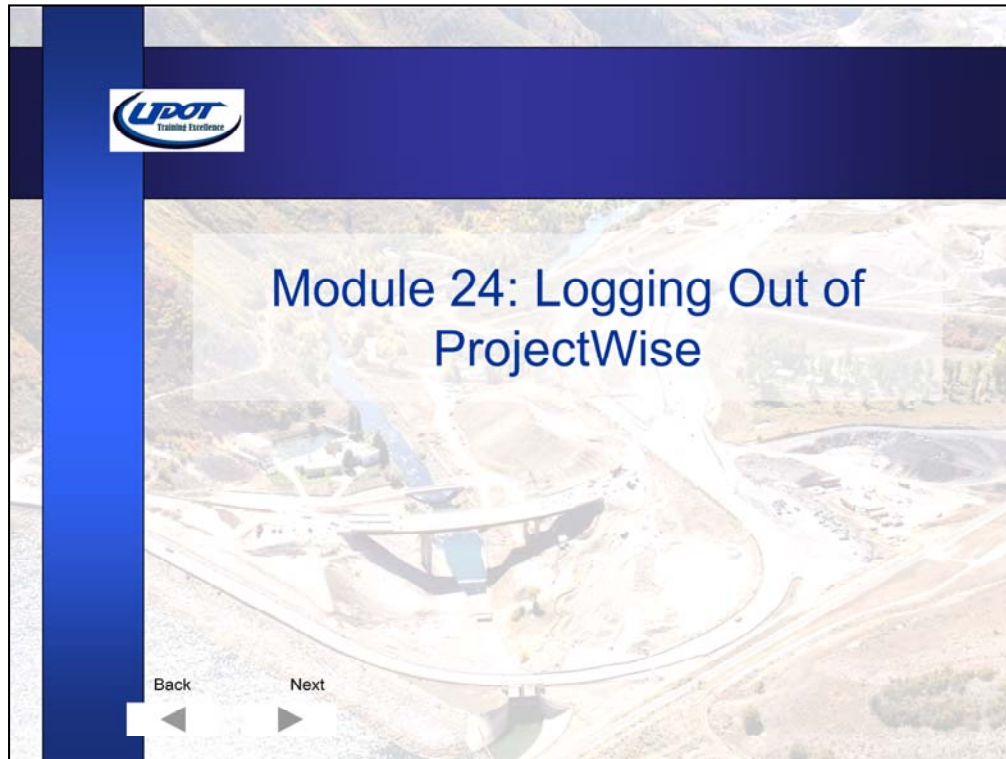


The screenshot shows the 'Define Criteria' window with a search results table. The table has columns for 'Name', 'Address', 'File Name', and 'Out To'. The search results are listed in the table, and a red circle highlights the table area. Below the table, a message states: 'There are no views registered that are able to display current selection.'

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Once the search is complete the results will be shown in the document pane.



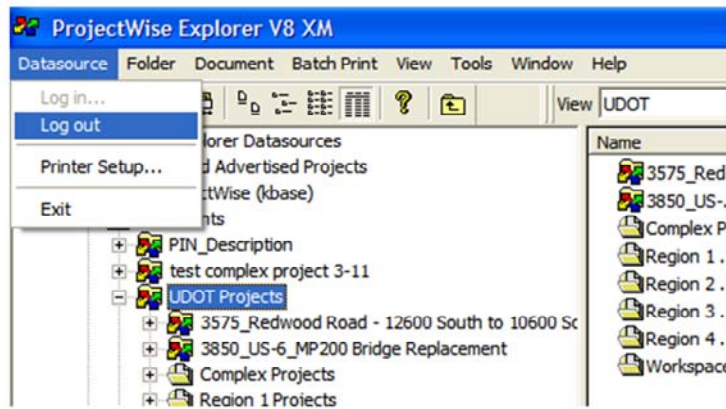
Logging out of the ProjectWise Explorer environment so some one else can login to your computer is covered in the next slide.



Logging Out

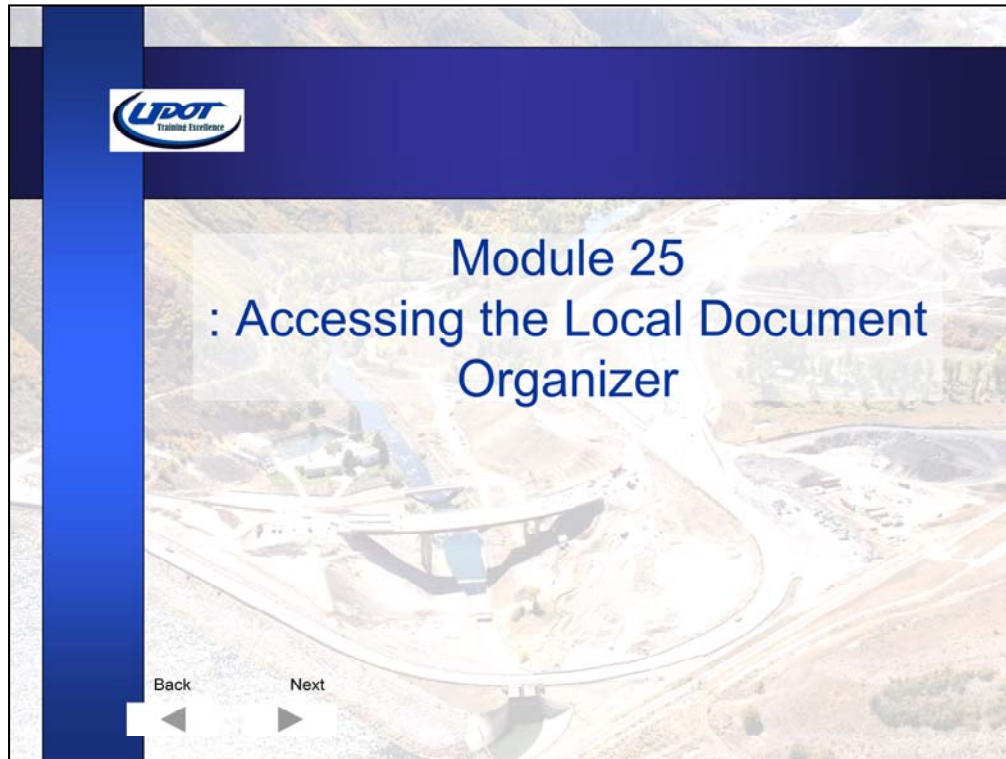
Multiple methods of logging out:

- Go to **Datasource > Log out**
- Right-Click datasource and select **Log Out**
- Exit ProjectWise Explorer

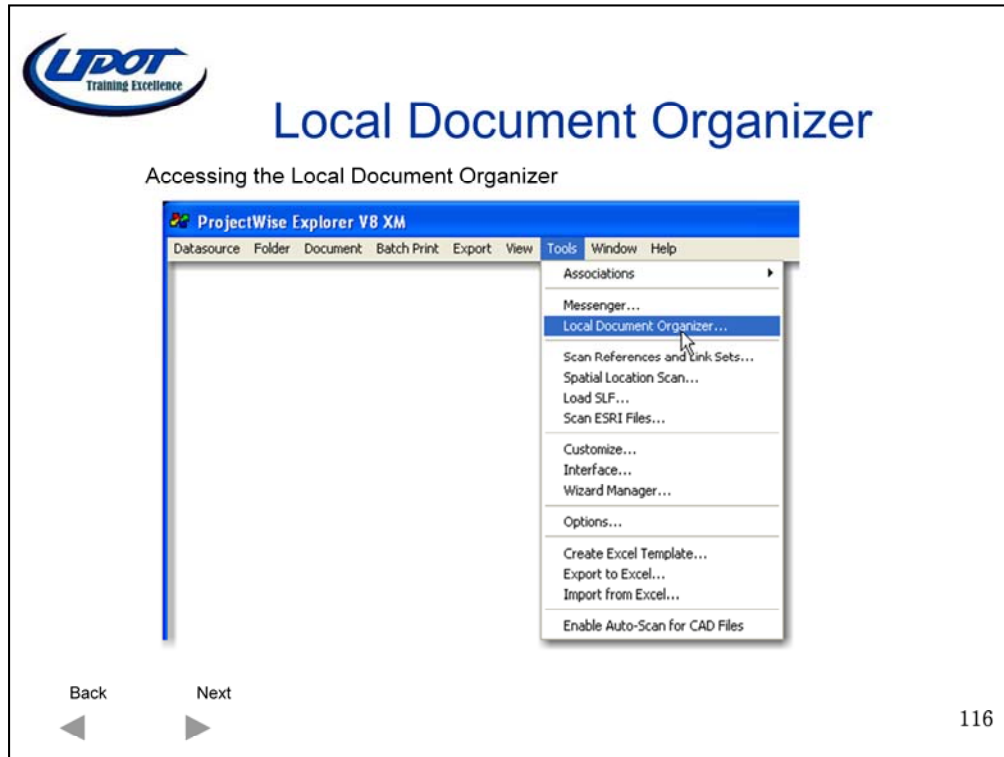


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To **log out** of ProjectWise Explorer, click on the **Datasource** pull down and select **Log Out**, this maybe so someone else can log into ProjectWise Explorer from your computer and have their settings, click on the **Datasource** pull down and select **Log Out**. Another choice is to leave the ProjectWise Explorer environment, by right clicking on the **Datasource** pull down and select the **Exit** command. This will take you completely out of the ProjectWise Explorer.



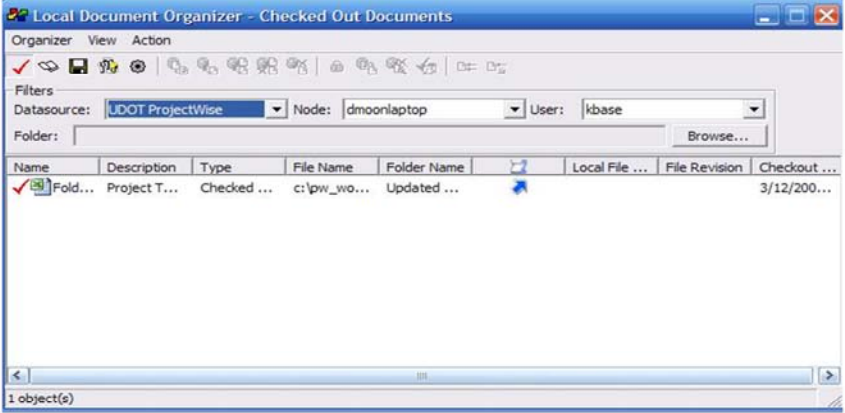
The following slides cover the use of the Local Document Organizer.



The Local Document Organizer can be accessed from the **Tools** pull down menu.
Note: When logging out of, or exiting ProjectWise Explorer the **Local Document Organizer** will display depending on your user settings if you still have documents checked out.

 **Local Document Organizer**

- Depending on your user settings, the Local Document Organizer will display automatically on logout if you have documents checked out



Local Document Organizer - Checked Out Documents

Organizer View Action


Filters
 Datasource: LUDOT ProjectWise Node: dmoonlaptop User: kbase
 Folder: Browse...

Name	Description	Type	File Name	Folder Name	Local File	File Revision	Checkout
✓ Fold...	Project T...	Checked ...	c:\pw_wo...	Updated ...			3/12/200...

1 object(s)

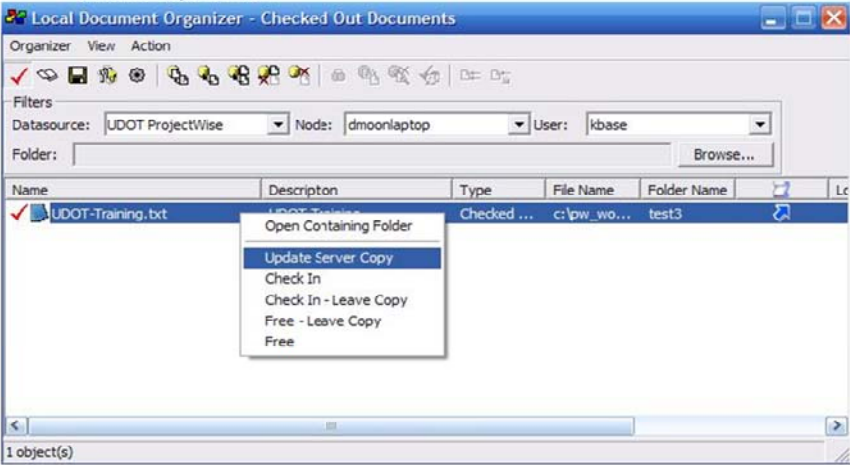
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When exiting ProjectWise if you have documents checked out the **Local Document Organizer** will display, allowing you to check the documents back in. **Note:** The Local Document Organizer can be used to manage the documents that you have exported from ProjectWise. You access the **Exports** listing by selecting the disk icon button or from the **View** menu pull down and choosing **Exports**. Also the Import or Update Server Copy commands can be accessed by right clicking on the documents or using the **Action** menu pull down.



Saving Your Changes

- The Update Server Copy command will save changes made to your file to ProjectWise




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To save changes to ProjectWise Explorer and continue to work on the document, use the **Local Document Organizer**, right click on the document select the **Local Document Organizer** from the list of commands and it opens the dialog box, highlight the file or document you want to update the changes to the ProjectWise Explorer, right click on the document and select the **Update Server Copy** command from the list. Note: this command takes the changes you have done to the document and updates the copy that is in ProjectWise so when others need to look at it they will get the most up to date information that you have entered, it also keeps it checked out to you so you can continue to work on the document. This command can be done as many times as needed while you have it checked out.



The next slide lists the contact information for the UDOT support for ProjectWise explorer. Note: there are CADD and Non-CADD support areas.



Support Resources

Email Address

projectwisesupport@utah.gov

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If needing ProjectWise Explorer support users can call the DTS Help Desk 801-965-4901. ETS has created an e-mail address for ProjectWise Explorer support. That E-mail address is projectwisesupport.utah.gov Send any problems or questions to this support e-mail and they will be answered in a timely manner.