

# Carollo Engineers ProjectWise Quick Reference Guide

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## INTRODUCTION

ProjectWise is an engineering project team collaboration system which is used to help teams improve quality, reduce rework, and meet project deadlines. The ProjectWise environment controls files as records in a database. ProjectWise will track changes to documents, store attributes for searching and grouping documents, control access to documents, create audit trails and manage distributed document locations. From any location, the managed ProjectWise environment will always have the same interface.

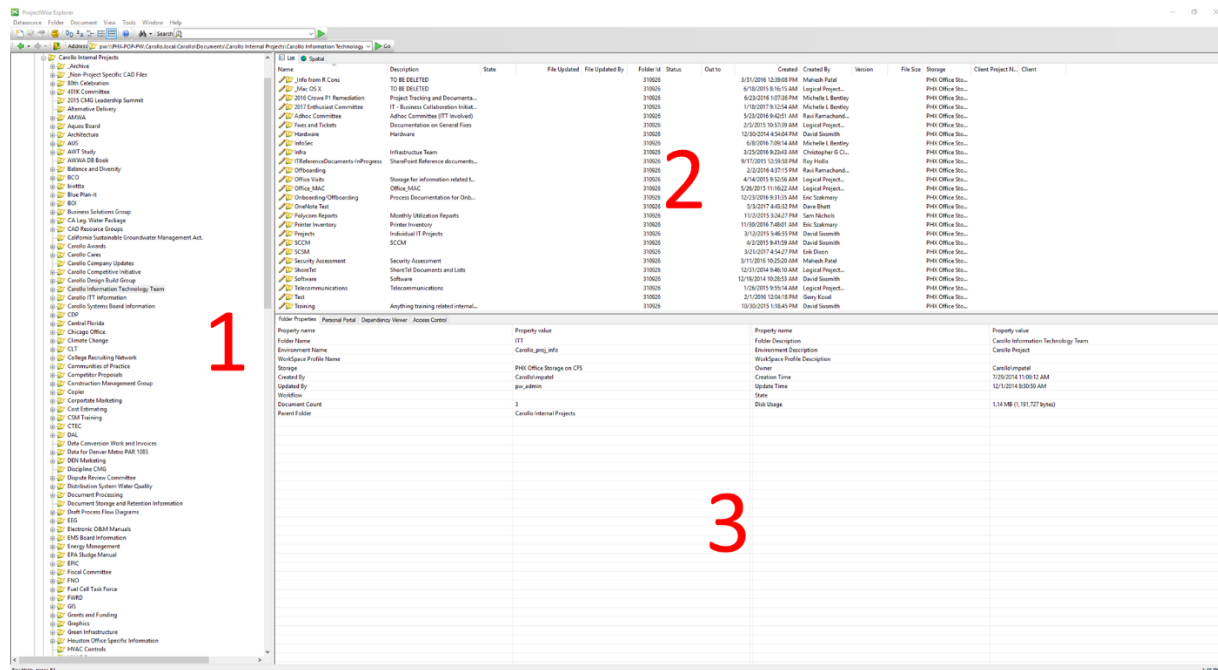
## MAIN SCREEN

The ProjectWise Explorer Window has three main sections

1. The Datasource/Folder View – left pane
2. The Document View – right pane
3. The Preview Pane – bottom of right pane

The Preview Pane contains several tabs:

- Folder/Project Properties tabs show their general properties,
- Document Properties tab shows the general properties when a document is selected,
- Personal Portal tab allows you to take advantage of custom LEARNING paths and software recommendations based on their role and skill level,
- Dependency Viewer tab shows any known dependencies of a selected document.
- Photo Preview tab let users preview an image, such as a photograph for image files.























The screenshot displays the ProjectWise Explorer interface. On the left, a tree view shows a hierarchy of folders and projects, with a red '1' indicating this section. The main area shows a list of documents with columns for Name, Description, State, File Uploaded, File Updated By, Folder ID, Status, Date, Created, Created By, Version, File Size, Storage, and Client Project Name. A red '2' is placed over this list. At the bottom, a preview pane is visible, showing document properties and a dependency viewer, with a red '3' indicating this section.



## ICONS

General ProjectWise Icons include Database Icons, Project /Folder Icons, Document Permission Icons and Application Icons. Detailed descriptions are in the following table:

Icons	Explanation
<b>Database Icons</b>	 Datasource: Indicates an individual Datasource.
	 Active Datasource: Indicates that the Datasource is open and in use
	 Open Datasource : Indicates that the Datasource is open but not in use
<b>Project /Folder Icons</b>	 Project folder: which has more functionalities than Folder.
	 Folder: Indicates folders and subfolders
	 Saved Searches parent folder
	 Save Searches Folder: Each user also has a personal folder
<b>Document Permission Icons</b>	 Read/Write - The pencil icon indicates that the document is checked in, and you have read/write permission for this document
	 Read Only - The open book icon indicates that you have read-only access to the document.
	 Locked - Document is either checked out, or has been exported, by another user. You can still open this document as read-only.
	 Checked Out - Document is checked out to you.
	 Exported - Document has been exported by you.
	 Final Status of a Document - Someone has set Final Status on this document.
	 Final Status of a Version - Someone has set Final Status on this version.
<b>Application Icons</b>	 The Default icon indicates a document is associated to an application, but the application itself has no associated icon.
	 The Unassociated icon indicates a document not associated to any application, or to one that has no file attached.
	 A ProjectWise markup document.
	 The Flat Set icon indicated a document group; several documents grouped together.
	 Represents a logical set for MicroStation.
	 Represents a logical set for AutoCAD.



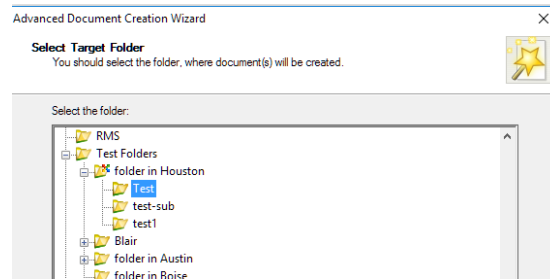
## WORKING WITH DOCUMENTS

- **Create Documents**

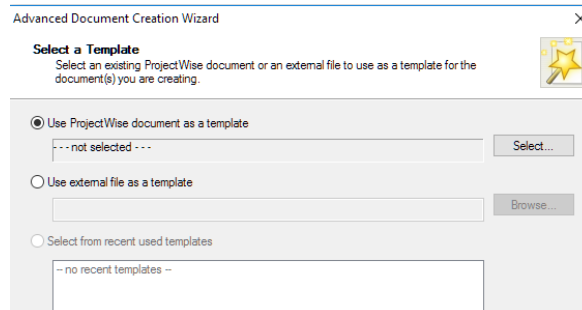
To create a document, you can copy an existing file from the Windows environment or ProjectWise datasource by dragging and dropping, or you can select New Document in ProjectWise similar to creating a new document in Windows Explorer.

No matter drag-drop or New Document, Advanced Wizard is suggested to create new documents. Here are the step-by-step instruction for Advanced Wizard:

1. When **Select Target Folder** page opens, select the project or folder in which to create the document and click Next.



2. The **Select a Template** page opens for you to select a file or document on which the new document will be based.
  - a. To create a new document based on an existing ProjectWise document, turn on “Use ProjectWise document as a template,” click Select, and select a document from the Select Template Document dialog box. If you are dragging an existing ProjectWise document from one folder to another, this option and the document you are dragging over will be selected by default.
  - b. To create a new document based on a file not currently stored in ProjectWise, turn on “Use external file as a template,” click Browse, and select the external file to use as your seed file. If you are dragging a file in from Windows Explorer, this option and the file you are dragging in will be selected by default.
  - c. To create a new document by using a file or document that has already been used by the wizard to create a new document, turn on “Select from recent used templates” and select the file or document to use from the list box. This option is disabled if this is the first time using the wizard.



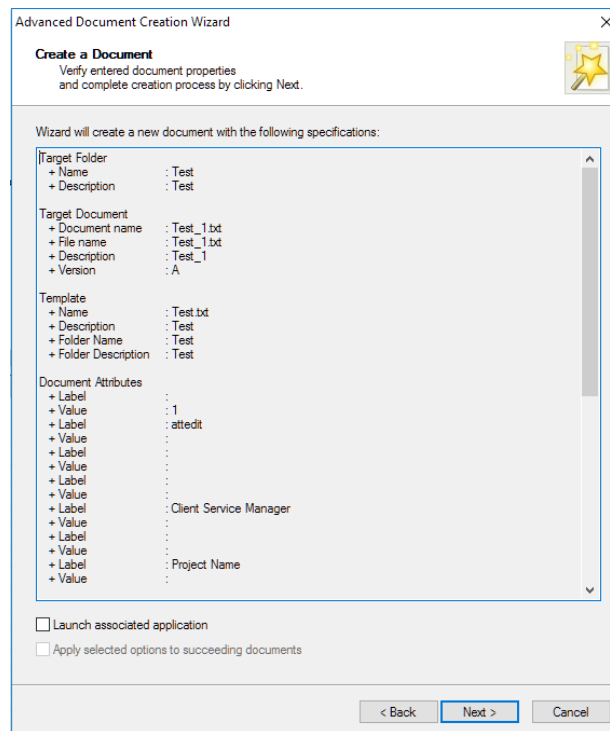


3. When the **Define Document Attributes** page opens, optionally enter the values in the attribute fields and click Next. These attributes will appear on the Attributes tab of the Document Properties dialog box. **Properly filling out the attributes will help other users identify files and find them with the ProjectWise search function.**

4. When the **Document Properties** page opens, enter new or edit existing values for the document name, description, file name, and version. All documents must have a unique document name, a description, and a unique file name within that folder. Properly filling out the description of the new file will help other users identify files and find them with the ProjectWise search function.



5. The **Create a Document** page opens, which displays all the document properties entered during the document creation process. To create the document, click Next. When the Completing the Advanced Document Creation Wizard page opens, click Finish.
  - a. (Optional) To open the newly created document(s) immediately upon completion, turn on “Launch associated application.”
  - b. (Optional) To apply all the previously selected configuration options to all the succeeding documents (if using the wizard to create multiple documents), turn on “Apply selected options to succeeding documents,” otherwise the wizard will appear for each document.



- **Check in/ check out**

When a team member wants to edit a file, they check out the file by opening the file (similar to opening a file in Windows Explorer). The file is placed in their local working directory and the database record is marked checked out to that user and “read only” to all other users. This places the file at the full disposal of the user who checked out the file. While the file is checked out, other team members can view the file but cannot make any changes.

When a file is checked in, the file is copied back to the server and the file becomes available for other users to check out.

A user can always refresh the checked out file on the server so that other team members can view or reference the latest version. (Right click on file in ProjectWise and select Update Server Copy.)

Files are automatically checked out when you open them. When you close the file, you will typically be prompted to check them back in. However if there is no prompt, go back to the file and right-click and select check-in. Also, you can use the Local Document Organizer to check files back in.



- **Free**

The free command changes the status of a document from checked-out to checked-in without updating the server copy. You can only free files that you have checked out. **Be careful, any changes made to the document will be lost when the document is freed.**

- **Delete**

Deleting a file in ProjectWise works similarly to deleting files in Windows Explorer. Select the file, right click, and select the Delete option. Should you accidentally delete a file, contact the ProjectWise Administrator to have it restored.

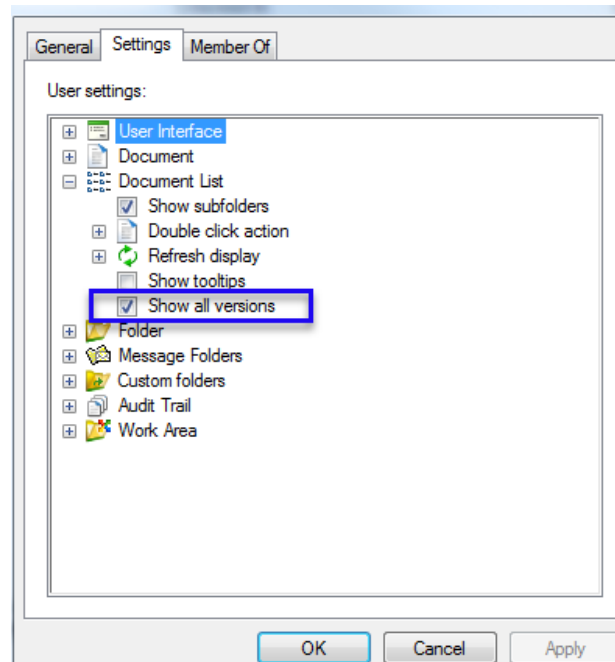
- **Rename**

Select the file, right-click, choose Rename. **The document name and file name should be the same except for the file extension.**

- **Version**

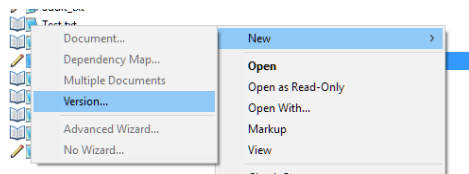
Through version control, you can create new documents, based on existing documents, while preserving the original document. The original document automatically becomes read-only and the new version is now the active document.

To show all versions or to turn off viewing of older versions go to Tools Menu > Options, select the Settings tab and open the Document List option.

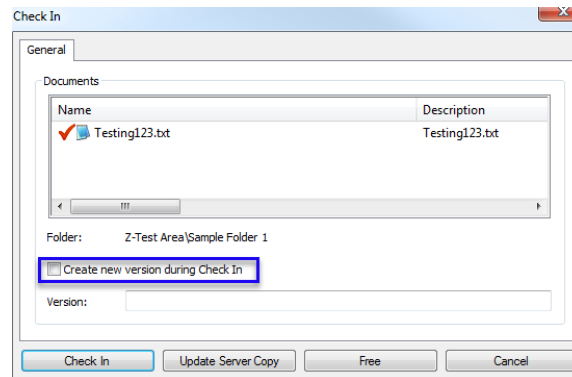


There are three ways to create new version:

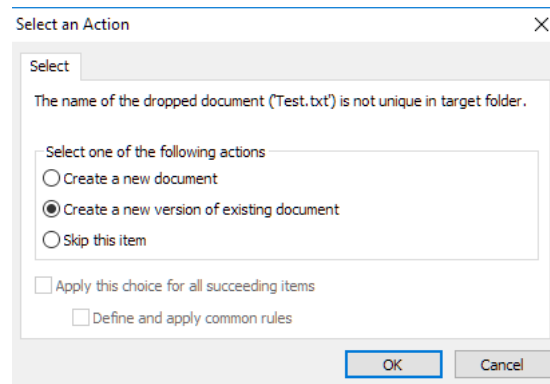
1. Select the file, right-click, select New, then Version.



- When checking in a document, select the “Create new version during Check In” option.



- When drag a file with the same file name from outside of ProjectWise into a folder. You must use the No Wizard Option. Drag and drop the file into the folder with the existing file. The “Select an Action” dialog will appear, select “Create a new version of existing document.”



- Copy/Move**

There are three ways to copy or move documents:

- Copy/Move Files by Dragging Them from One Folder to Another.

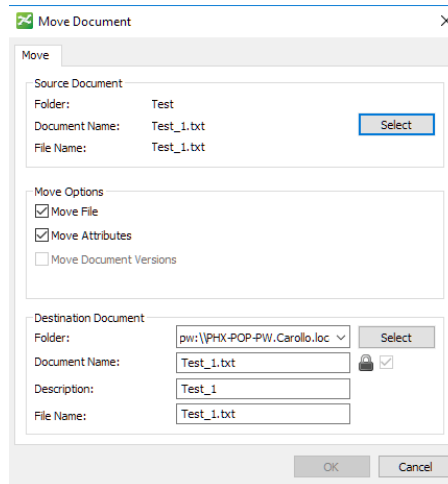
To copy: drag the selected files from the document window into the target folder.



To move: press the <Shift> key and drag the selected documents from the document window to the target folder.

2. Copy/Move Documents One at a Time Using the Copy/Move Document Dialog Box.

Select a document and choose Document > Copy/Move To... The Copy/Move Document dialog box opens.



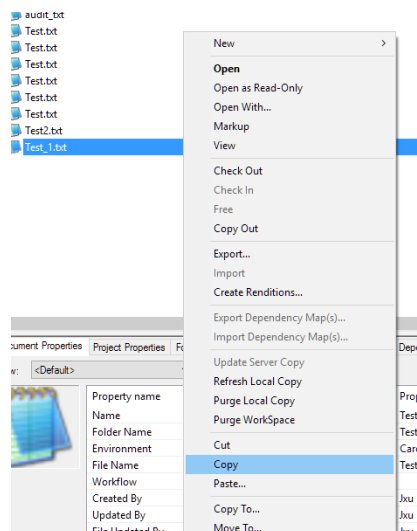
3. Copy/Move Documents using Copy/Cut and Paste.

Select Document > Copy/Cut.

Select the folder or project to which you want to move the document(s).

Select Document > Paste.

When prompted, Do you want to move document(s) here?, click Yes.



- **Export/import**

1. Select one or more documents and choose Document > Export.
2. The Document Export Wizard opens and click Next.



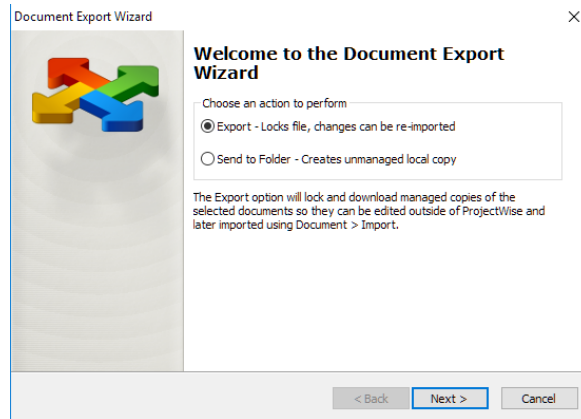
3. **Define the export settings** page opens. If all of the selected documents are currently exclusively checked out or exported, the Export option is disabled and the “Send To Folder” option is automatically turned on. There are two ways to export:

a. Export - Locks File, changes can be re-imported

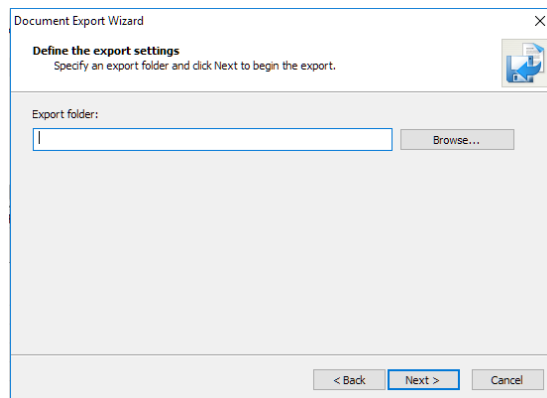
The documents will be locked to other users until they are imported back into ProjectWise.

b. Send to Folder – Create unmanaged local copy

The documents will still be accessible for other users to edit.



c. Select Next. Click Browse to select the export location, or type the location to which to export the document(s) directly in the Export folder field. If this folder does not exist, it will be created upon export.



d. Click Next. The documents are exported to the target folder, and the results are displayed in the wizard and click Finish.

4. To import documents, Select one or more exclusively exported documents. Choose Document > Import. You can also use the Local Document Organizer to import your documents.

- Workflow states**

Files that go to the client need to be formatted by document processing so a consistent format is maintained. Certain folders will have assigned workflows or states so that a document is protected once it has been formatted. These folders are: Correspondence, Deliverables, Meetings and Specifications.

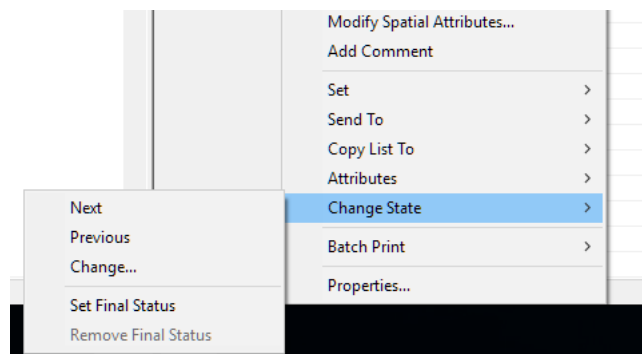
When users create a document, the file is automatically given an “In Progress” state. The document can be accessed for editing by all users. When the user is ready to have the file formatted and proofed, a link to the correct document can be emailed to document processing.

A document processor will open the file, correct the format, and proofread the file. Then the document processor will change the state to “In Document Processing.” At this point, the document will become “read only” to engineers.

If users elect to make edits on the electronic file, they may: Call the document processor and ask them to change the state so the file can be edited, or Create a new version of the file and re-email the link to document processing so the formatting can be rechecked.

### 1. Change Documents State in the Workflow

Select one or more documents. Choose Document > Change State > Next/ Previous/Change.

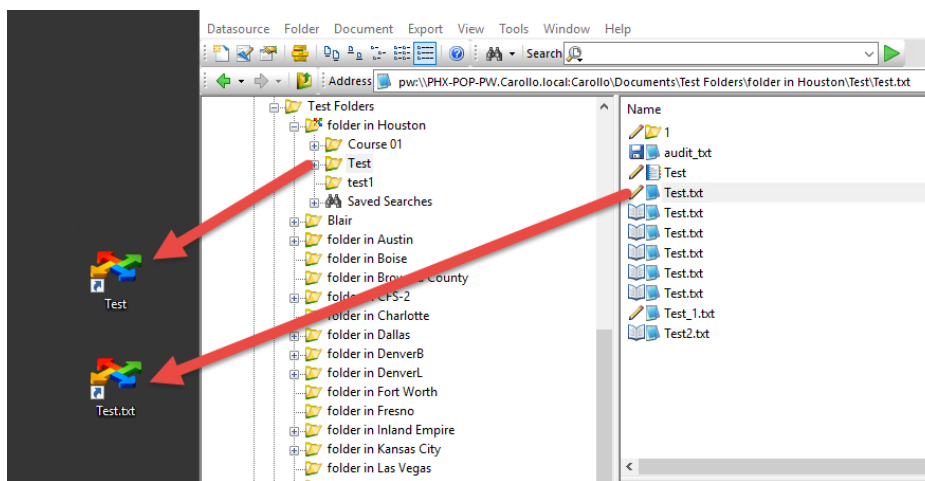


### 2. Setting FINAL Status When File Goes to Client

FINAL status locks the document and indicates this version is a snapshot of what was sent to the client. Be sure it is very clear with the PM who has responsibility to do this (engineer who emails document to client, document processor who is told that this document has gone to the client, etc.).

- **Desktop shortcut**

Desktop shortcuts can be created for both folders and files. Simply drag and drop the target folder/file to you windows desktop, and this will create a shortcut on Windows desktop.





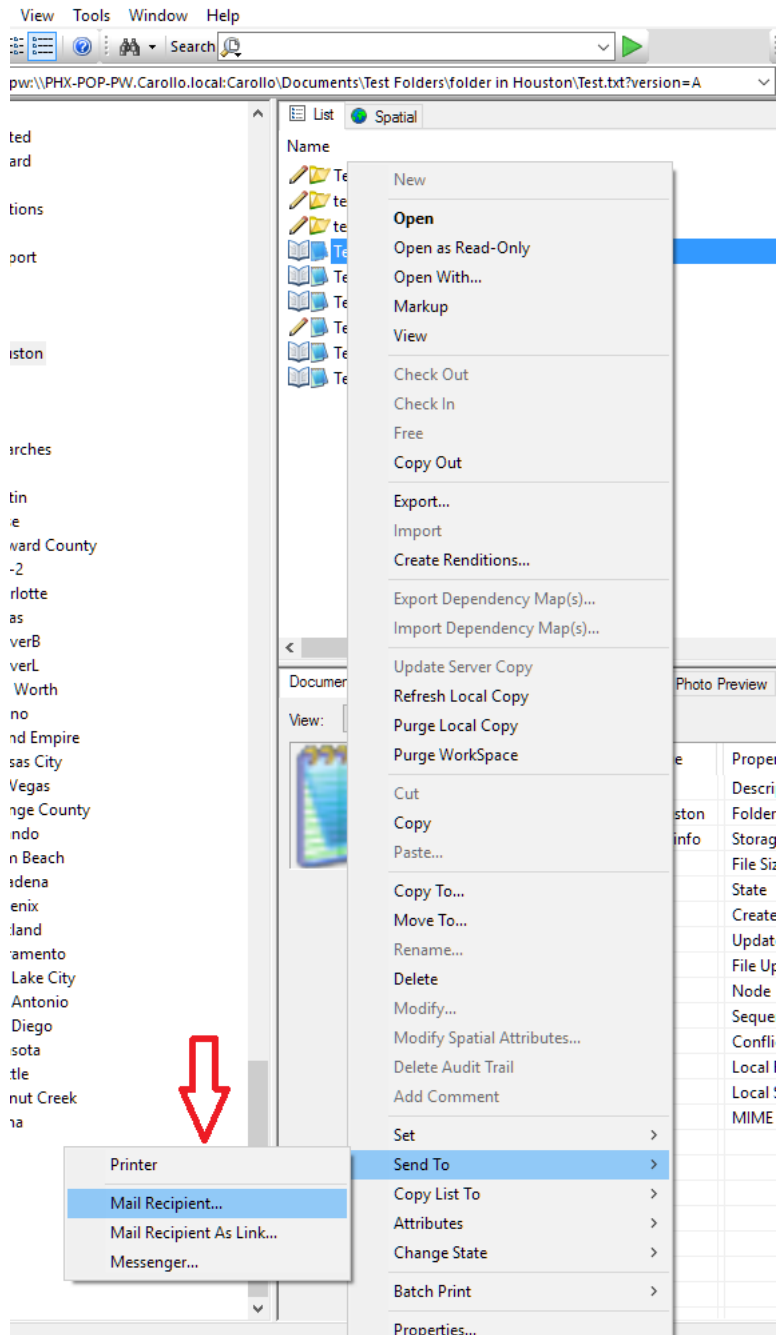
**ProjectWise**  
CONNECT Edition



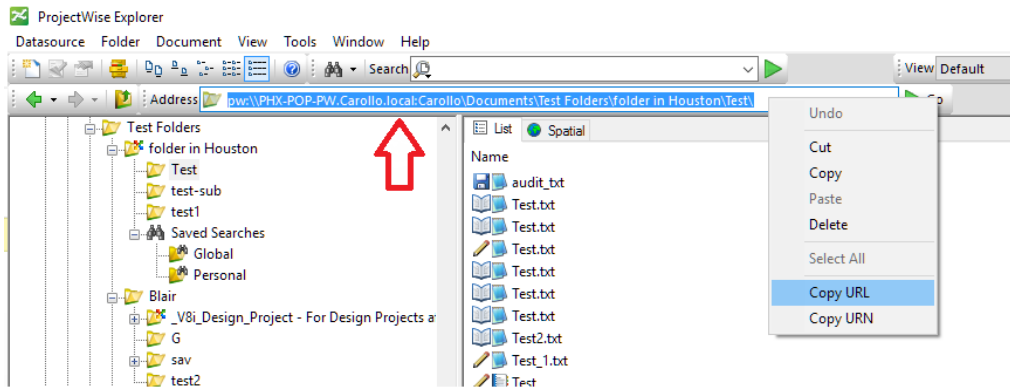
By double clicking the shortcut, it will direct you to the folder/file in ProjectWise.

- **Share ProjectWise file**

ProjectWise file can be shared by right clicking the file and choosing 'Send To'. There are two ways to send file: Mail Recipient will send out a copy of file as attachment, 'Mail Recipient As' Link will send out the ProjectWise link of file and recipient can open the link in their ProjectWise Explore.



ProjectWise link can also be found in address bar, and it can also be copied and sent by either Copy URL or Copy URN. URN uses the document GUID (a unique identifier) and URL uses full folder path. PLEASE USE URN WHEN THE FILE LINK CONTAINS SPECIAL CHARACTERS, SUCH AS “®”.



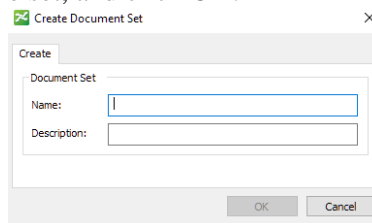
- Flat set

A flat set is a group of documents that are placed into a container for some purpose, such as for printing, or to simplify the checkout of multiple documents across folders. When you right-click a flat set, you will see all of the options available to you for working with the flat set. When you have a flat set open, you can select and right-click the documents in the set and perform actions on them just as you would from any folder in ProjectWise Explorer.

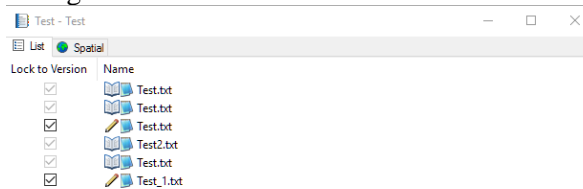
You can place a single document into as many sets as you want. The document is not physically copied into the set, but a record of the document is added to the set. Because of this, removing a document from a set does not remove the document from the folder in ProjectWise in which it exists.

When you check out a flat set, all documents in the set are checked out. When you check in a flat set, and if you are required to enter change comments upon check in, you are only presented with one Check In dialog box in which to enter your comments.

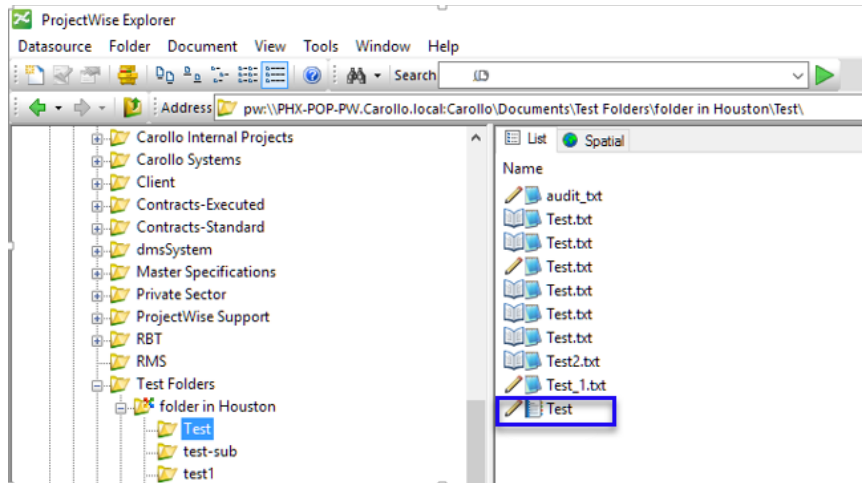
1. Choose Document > Set > New. The Create Document Set dialog box opens. Type a name and optionally a description of the set, and click OK.



2. An empty set window opens for you to add documents. The title bar of the set window shows the name of the containing folder followed by the name of the set. Select documents from any folder in the datasource and drag them into the set window.



3. Once the first document is added, the flat set is created in ProjectWise, and displays in the documents window of the originally selected folder.



4. If you close the flat set before adding documents to it, the empty flat set will not be saved to ProjectWise. Further, once the last document is removed from a flat set, the empty set is automatically deleted.

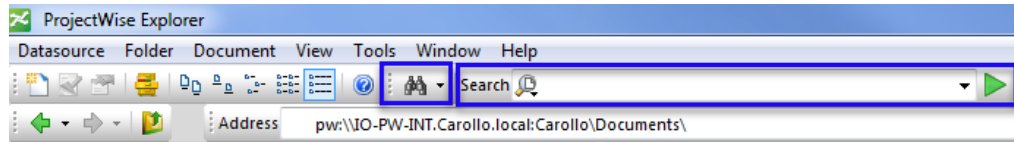


## SEARCHES

You can search on system attributes, on custom attributes, or both. Note that if you search on system attributes or on custom attributes, the results of the search will only be as accurate as the data entered by other users.

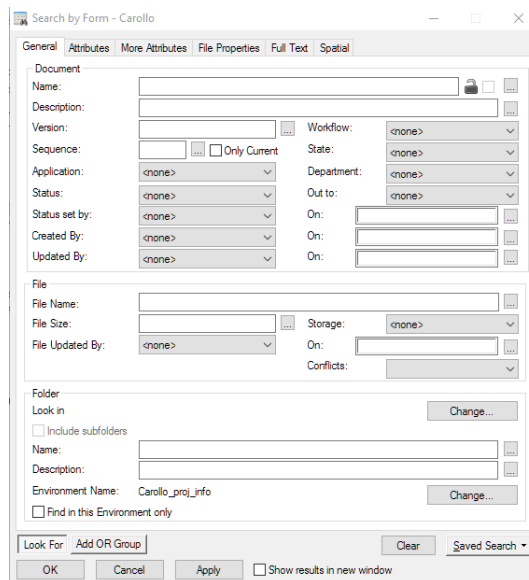
- **General Search**

Quick Search is a “Google-like” search field available on the new Search toolbar that lets users search for documents, folders, and projects, simply by typing the text they want to search by and clicking Start search. Quick searches are not case sensitive, and the Quick Search field stores the most recently used searches for quick access.



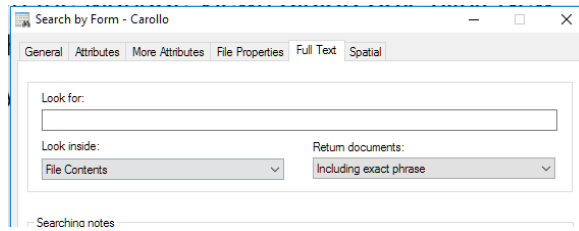
- **Search by Form**

Go to Folder>Advanced Search>Search by Form, and fill in the attributes you want to search for, such as file name, created by, description, etc. The Search by Form has different tabs listing attributes that can be used to base a search on. Available fields are white. Grey fields are unavailable to search on.



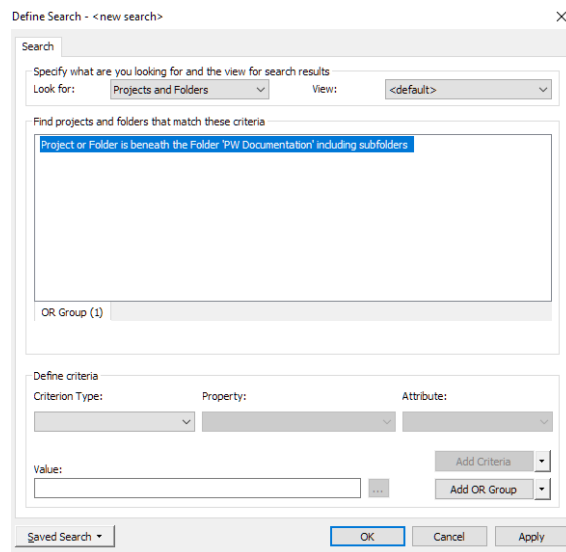
Search by Form can also be used to search by text. On Search for Form, select the Full Text tab. In the “Look for” field, type the text string you want to search for. To search inside documents’ files for the specified text, set “Look inside” to File Contents. Click Apply or OK.





- **Search Builder**

Go to Folder>Advanced Search>Search Builder. When using the Define Search dialog box, you first select the type of search (document or project/folder), then you select what you want to search by. When you reach the Value field, depending on the property selected, the Value field either becomes a dropdown list box containing fixed options obtained from the datasource, or a text field with an accompanying Format (...) button. Just like in the Search by Form dialog box, you can either type in the text field, or click the Format button to build a custom search expression. The text you type in search fields may or may not be case sensitive, depending on whether or not your administrator has turned on the option in the datasource to enforce case sensitivity for searches. Click OK to run the search and close the dialog box, or click Apply to run the search but leave the dialog box open. Documents matching your search criteria display in the Search Results window.

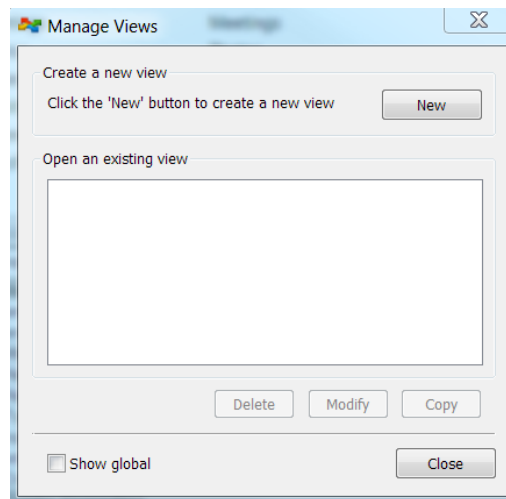


## VIEWS

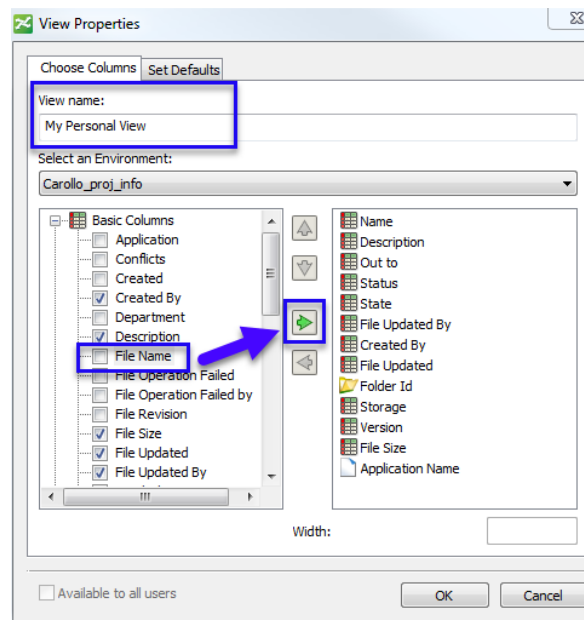
Views are used to control the properties (in the form of columns) that display in the documents window when a folder or project is selected and when View > Details is on.

- **Create and Customize Personal View**

1. Open ProjectWise Explorer>Views> Manage Views, Click “New” and you can custom your view here.

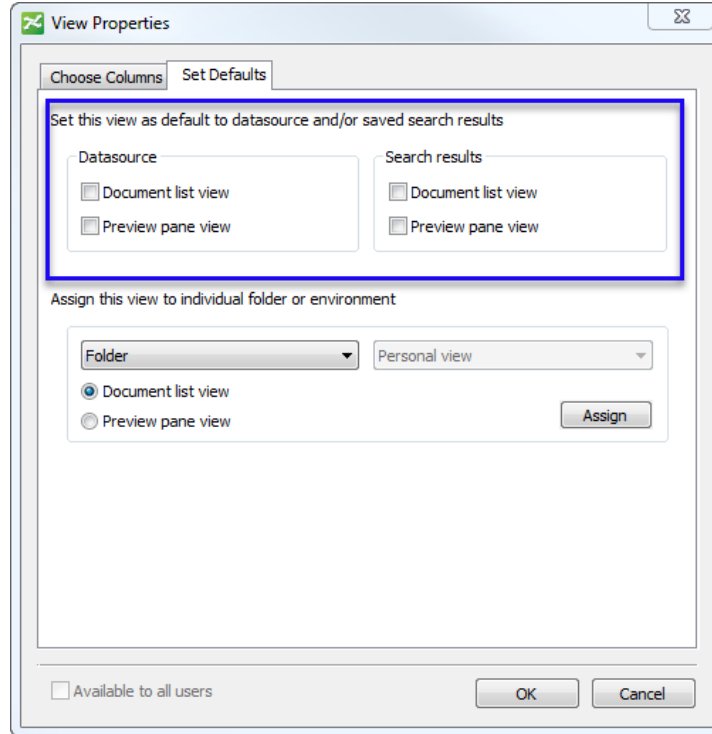


2. Enter the name of your personal view, do not change the environment, select the column you want and click “left/right arrow” and it will be added to your personal view. You can also sort the order of these columns by using the “up/down arrow”.





3. If you want to make this as your default view, go to “Set Defaults” tag and check all 4 highlighted options.



4. Click OK and refresh ProjectWise.

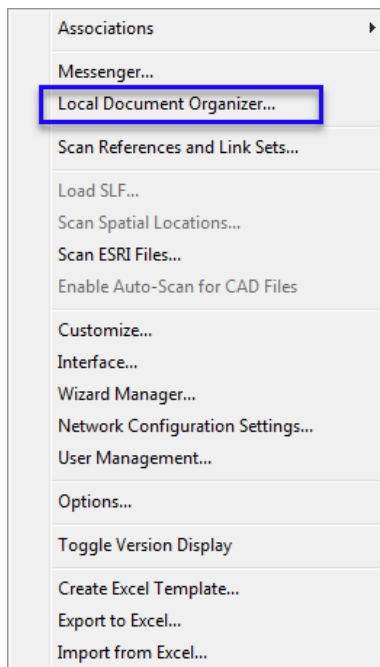
## MAINTENANCE



- **Local Document Organizer**

Local Document Organizer is used to list and manage the documents that you currently have checked out, copied out, or exported. Local Document Organizer opens automatically when you log out if you still have documents checked out. The Local Document Organizer dialog box always opens with the View set to display Checked out Documents. The actions you can perform from the Local Document Organizer dialog box depend on the View option that is active. You can select multiple documents in the Local Document Organizer's list box and apply a command to all of them simultaneously.

**To avoid ProjectWise slowness, all users are suggested to clean local documents and workspace biweekly as below, weekly clean is suggested for heavily used machine, such as CAD drafting.**

1. ALL FILES MUST BE SAVED AND CHECKED IN FIRST!
2. Open ProjectWise Explorer>Tools>Local Document Organizer. The purpose of the Local Document Organizer is to manage documents and workspace that have been Checked, Copied, or Exported Out to your local drive.



3. In the open dialog, click Copies icon  and you will see all copies on you laptop, select all copies (CTRL + A) or the ones you need to purge, click Purge Copy icon . This will delete local document copies.





- **Changing/Updating ProjectWise Passwords (for external users only)**

In ProjectWise Explorer, go to Tools > Options > Under the General Tab, enter the following information:

**Old Password:** *Enter the assigned (or old) password*

**New Password:** *Enter the newly desired password*

**Verify New Password:** *Re-enter the new password*

Hit **Apply** or **OK** to save the new password.

User.Carollo Properties

General Settings Member Of Personal Workspace

User.Carollo

Description: User @ Carollo - ProjectWise Team

E-mail: pw\_coordinator@carollo.com

Type: Logical

Old password: [masked]

New password: [masked]

Verify new password: [masked]

OK Cancel Apply