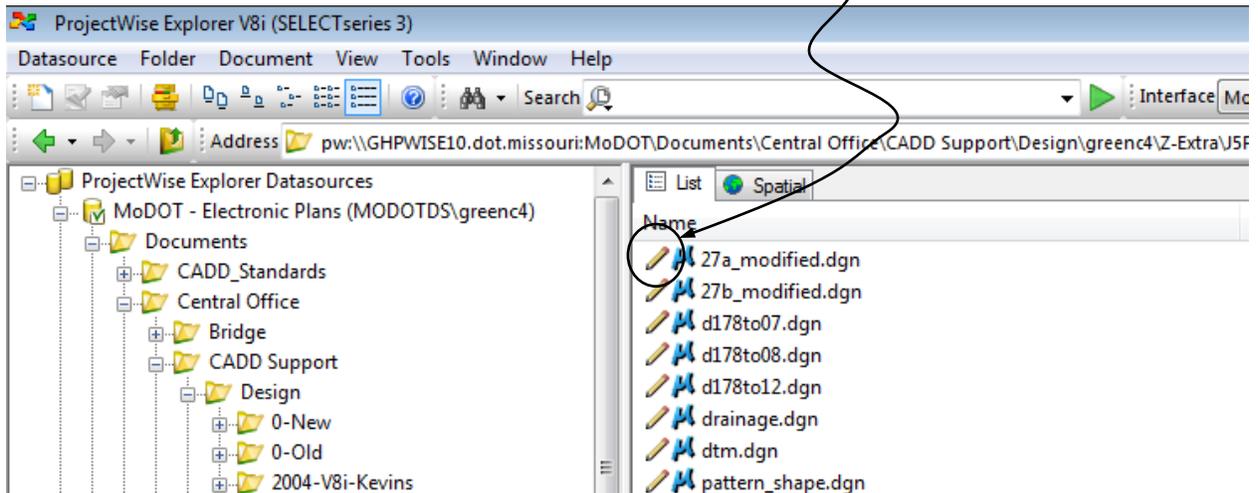




Working with Documents

Document Icons

Each document in the documents window has two icons associated with it. The first icon indicates the permissions and usage for the document.



Icons that indicate a document's permission and status

Icon	Description
	Pencil icon – Read/Write access.
	Open book – Read access only (either because access control is set to read-only or because the document is not the active version).
	Lock – Document is currently checked out or has been exported by another user.
	Red check mark – Document is checked out by you.
	Exported – Document has been exported by you.
	Exported – Document has been exported by you.
	Exported – Document has been exported by you.

Icons that indicate a document's type and associated application

The second icon next to an entry in the document's window indicates whether it is

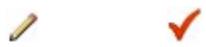
- A free standing document (a document not grouped in a set).
- An unassigned document (one which has not been assigned to an application).
- A redline document (one which has been created using the ProjectWise redline feature).
- A flat set (a set of documents at the same level).
- The parent (master) file of a logical set (a nested set of MicroStation reference documents).

Icon	Description
	Default – This icon displays when a document is associated to an application, but the application has no icon associated to it.
	Unassociated – +This icon displays next to a document which is not associated to an application.
	Redline – ProjectWise Redline Document.
	Flat Set – Document Group.
	Logical Set (MicroStation) – MicroStation Master file with references attached.
	Logical Set (MicroStation) – MicroStation Master file storing a link set.
	Logical Set (MicroStation) – MicroStation Master file with references attached and storing a link set.
	Logical Set (AutoCad) – AutoCad Master file with references attached.

Checking Out and Opening Documents

Checking out a document locks the document so that no other user can make changes to it while you are working on it. To check out a document, you must have read/write privileges for that document.

You can either check out the document or open it later, or you can check out the document and open it simultaneously. Opening a document to which you have read/write privileges checks the document out (if not already checked out), downloads a copy of the document from the ProjectWise server to your working directory, and then opens the document in the appropriate application.



When a document is checked out, the document's read/write (pencil) icon is replaced by a check mark icon to show that you have checked out the document.



To other users, a lock icon to show that another user has locked the document replaces the read/write icon.

- You can only check out documents for which you have read/write privileges, and which are not locked by you or another user.

To check out one or more documents (to be edited later)

1. In the documents window, select one or more checked in documents to which you have write access and from the Document menu, choose Check Out.

To check out and open a document (in its associated application)

1. In the documents window, select a checked in document to which you have write access and from the Document menu, choose Open.
The document is checked out and opened. The program that launches depends on the ProjectWise application associated to the document, and the program defined to open documents associated to that application.

To open a document in a new instance of the document's associated application

1. Open a document from ProjectWise Explorer (Document > Open).
2. After the document opens in its associated application, go back to ProjectWise Explorer and select another document associated to the same application.
3. This time, press the <Shift> key and choose Document > Open.
The second document opens in a new instance of the associated application.

You can also check out and open documents in applications other than their associated application. Opening documents in this way does not change the application's associated executable.

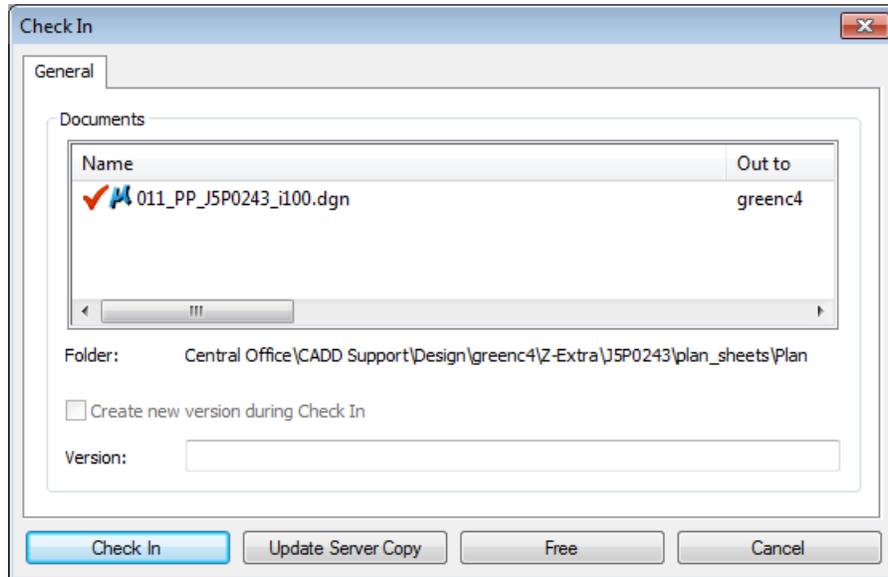
To check out and open a document (in an application other than the associated application)

1. In the documents window, select a document and from the Document menu, choose Open With. A standard file open dialog box opens, allowing you to search for the program shortcut or executable file for the application in which you want to open the file.
2. Navigate to and select the appropriate executable (.exe) file or program shortcut, then click Open. The selected document is checked out and is opened in the selected application.

Document Check In

Document “Check In” from the editing application

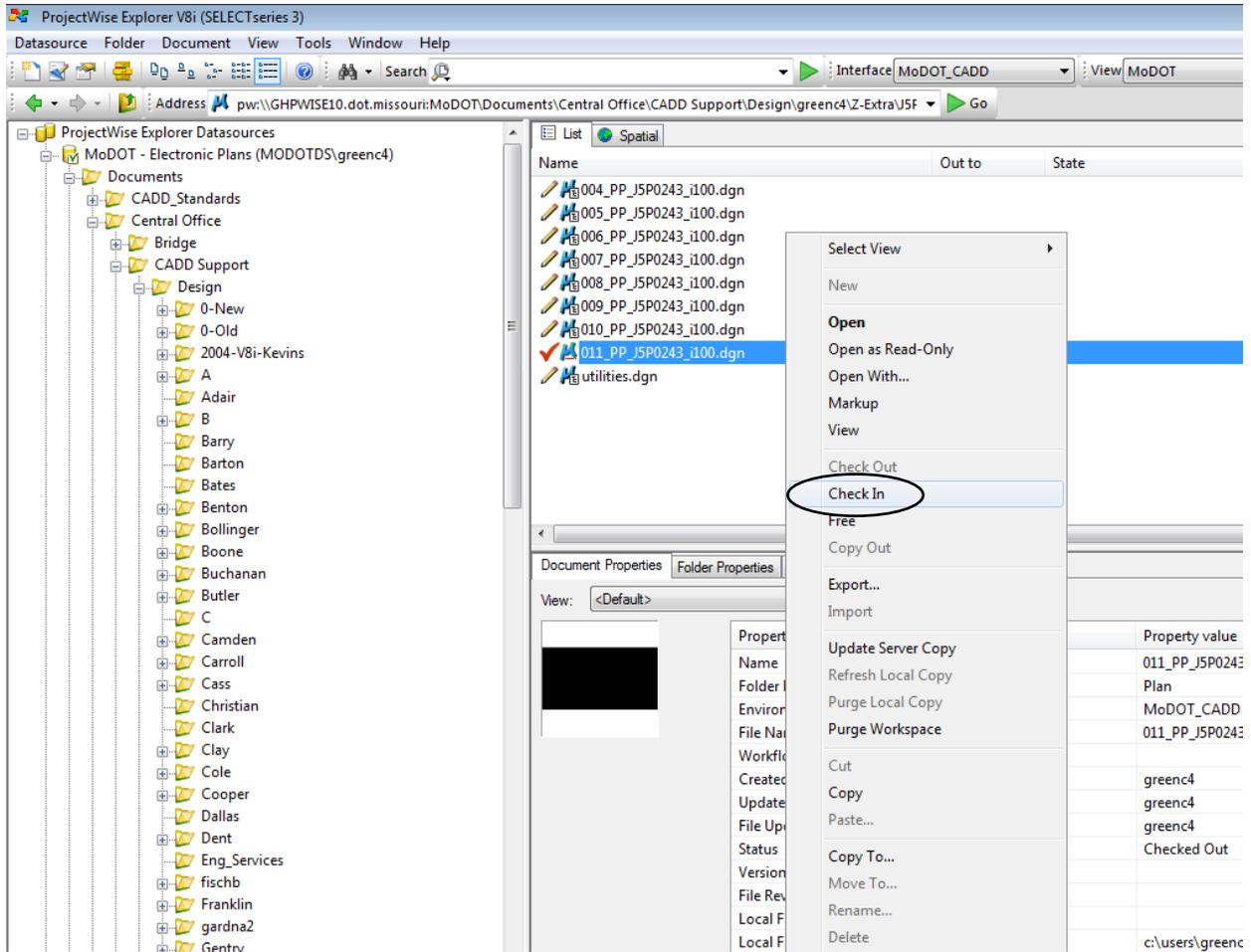
When you close a document that is stored in ProjectWise, you will be prompted to check it back in.



You have options to either *Check In*, *Update Server Copy*, *Free*, or *Cancel*. Normally you will select the **Check In** option, which updates the file back to the server and also checks the document back into ProjectWise to where other users can open and modify it. Checking in a document also replaces the document's check mark icon (or to other users, the lock icon) with its read/write (pencil) icon.

- **Check In** – Updates the server copy of the document with changes you made in your local copy and returns the document's status from Checked Out to Checked In.
- **Update Server Copy** – Updates the server copy of the document with changes you made in your local copy and leaves the document's status set to Checked Out.
- **Free** – Returns the document status from Checked Out to Checked In, but does not delete the local copy of the document.
- **Cancel** - Closes the Check In dialog without taking any action on the document. If you later want to check in, update server copy, or free this document, you can do so from ProjectWise Explorer.

Document “Check In” from ProjectWise Explorer

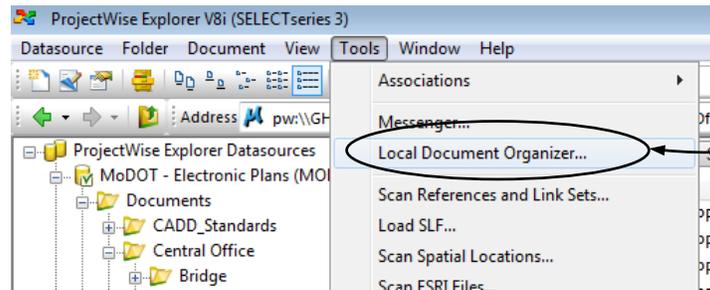


You can also check in a document through ProjectWise Explorer. Simply right click over the checked out document and choose the “*Check In*” option.

Important: If a checked out document is open in an application and you attempt to “check in” the document from ProjectWise Explorer, you will receive an error message and ProjectWise will not allow you to “check in” the document until you close the document.

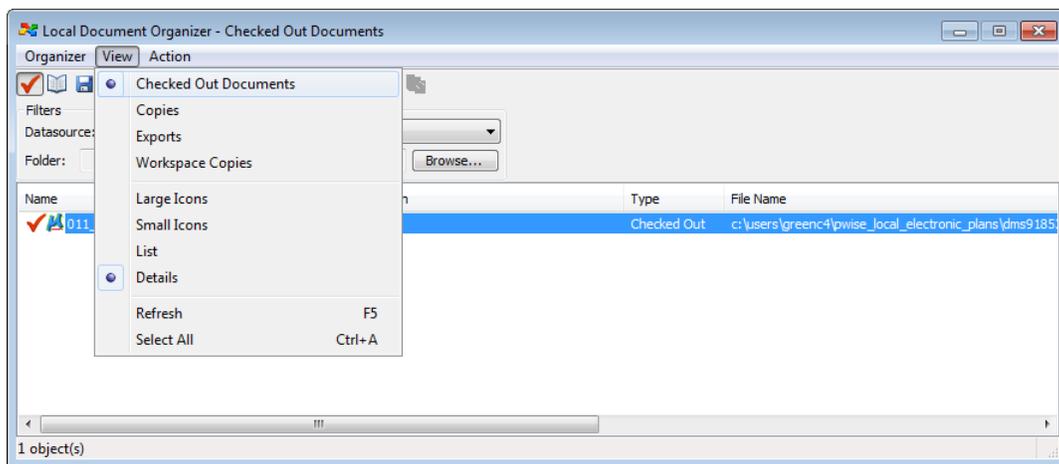
Document “Check In” from the Local Document Organizer

Open the *Local Document Organizer* dialog box by choosing *Local Document Organizer* from the Tools pull down menu.



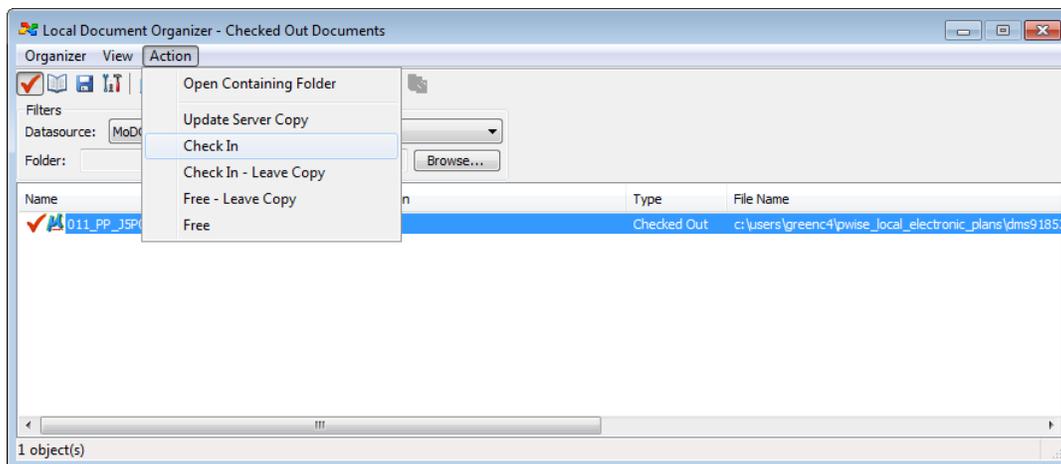
Under the *View* menu, choose *Checked Out Documents*.

All of the documents you currently have checked out will display in the document window.



In the document window, select one or more of the checked out documents.

To check in the documents, simply choose either *Check In* or *Check In – Leave Copy* from the *Action* pull down menu.

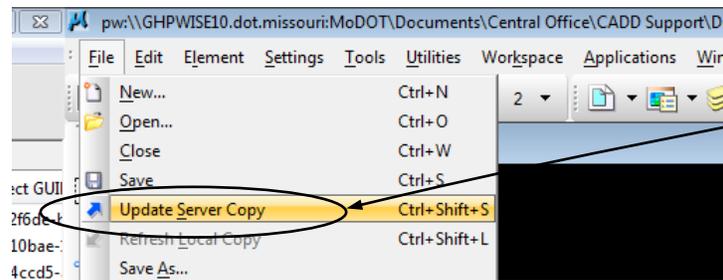


The *Check In* and *Check In – Leave Copy* options do the same action within MoDOT’s configuration.

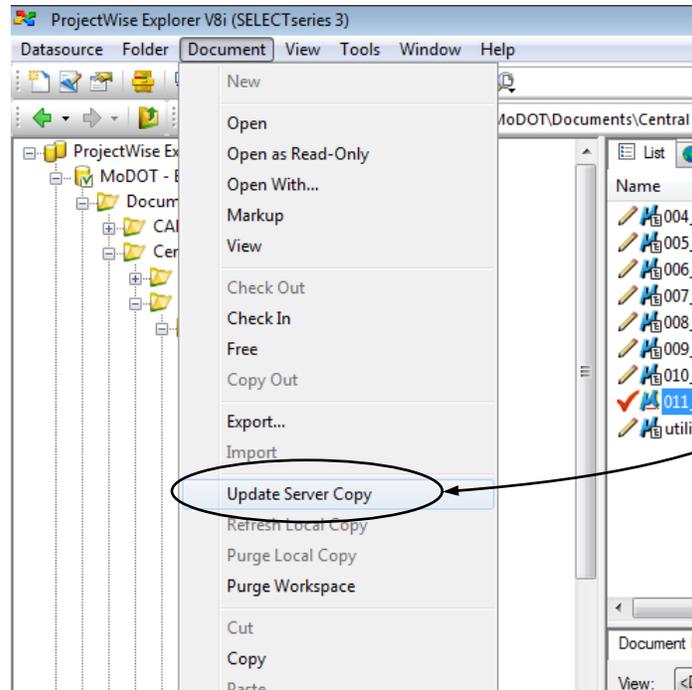
Updating documents in ProjectWise without checking them in

There may be times where ProjectWise users may need to see the most recent changes you have made to a document, while you may not be ready to disrupt your workflow and check in the document. In this scenario, you can use *Update Server Copy* option to replace the server copy of a document by the copy of the document you have checked out, without actually checking in the document, and while maintaining 'checked out' status.

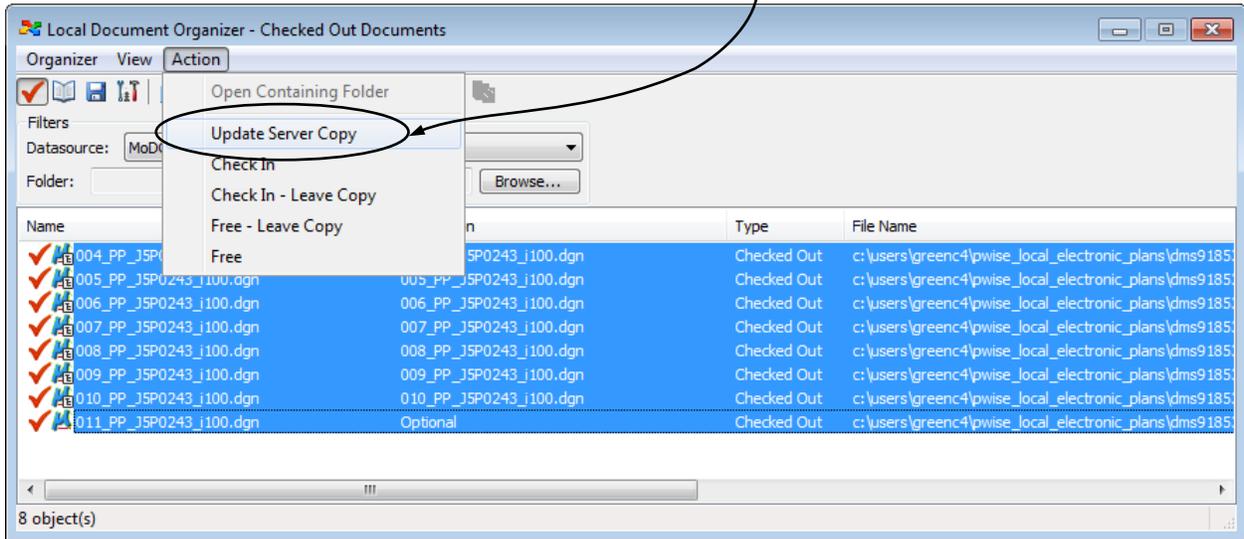
From MicroStation, you can choose the *Update Server Copy* from the *File* pull down menu.



From ProjectWise Explorer, you can choose the *Update Server Copy* from the *Document* pull down menu. Another option in ProjectWise is to right click over the checked out file, then select the *Update Server Copy* option.



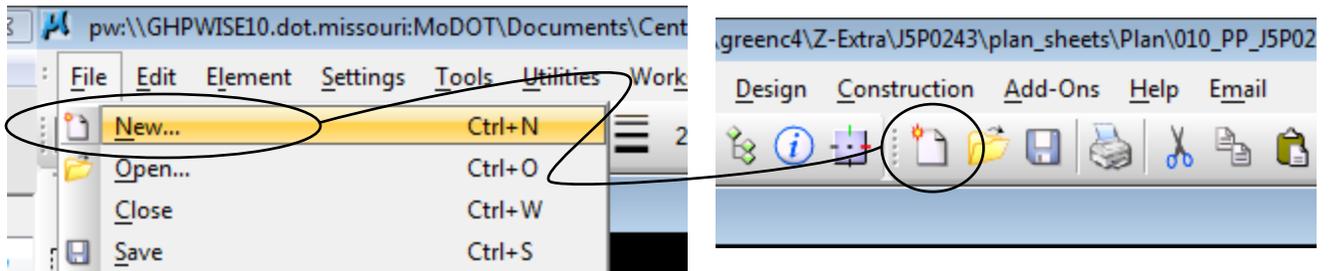
You may also use the *Local Document Organizer* in ProjectWise and select *Update Server Copy* to update a file without closing and checking in the file.



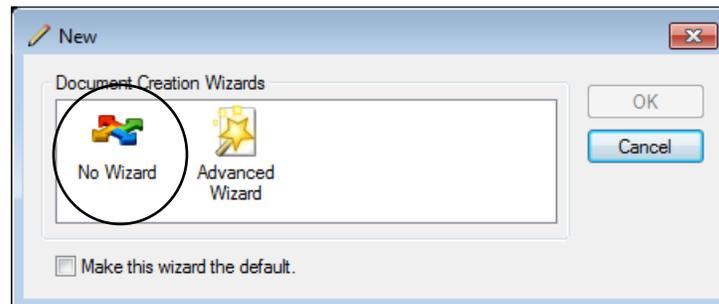
Creating ProjectWise Documents from MicroStation

There are two options when you choose to create a new document in MicroStation through ProjectWise, **No Wizard** and **Advanced Wizard**.

The *No Wizard* option is an option that allows the user to create the document file and come back to fill in the attributes after the file has been created. Using the *Advanced Wizard* allows the user to fill out the attributes as part of the creating file routine.

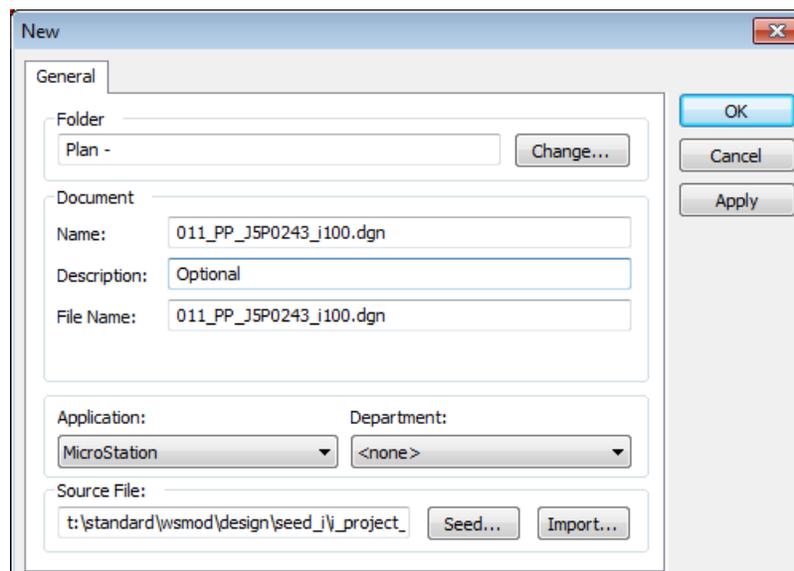


Choosing to create a new file from MicroStation either by the pull down or the icon will open the *New Document Creation Wizards* dialog box.



No Wizard option

We will go through the **No Wizard** option. Selecting the *No Wizard* option opens a *New* dialog box with the General tab.



General tab

Folder option – Displays the current folder location that the Design file will be created in or choosing the Change button and then choosing the preferred folder location can modify this.

Document options – Name & File Name need to be the same.

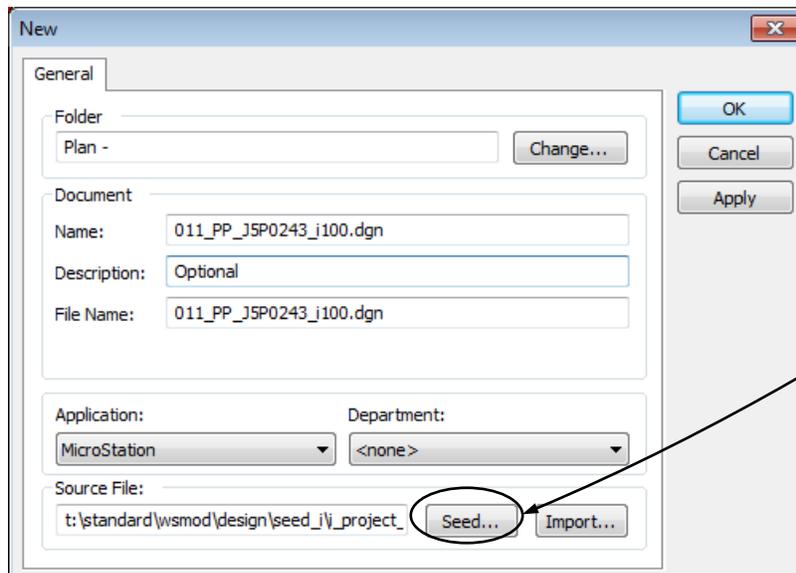
- Name: Name of the document that ProjectWise recognizes as the document placeholder.
- File Name: Name of the file as required through MoDOT's file naming convention criteria.
- Description: (optional)

Application – Allows the user to pick through a list of applications that will be associated with the file.

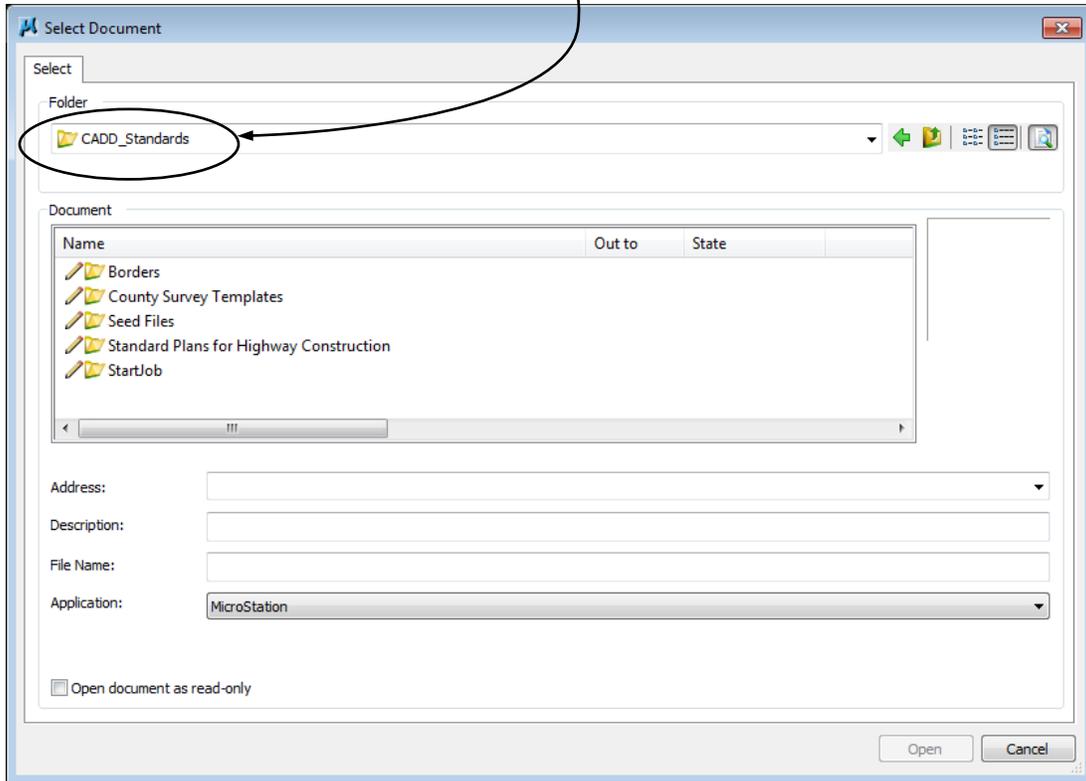
Department – Allows the user to pick from a list of departments that this document will pertain to.

Source File – Allows the user to use a seed file or import a file from outside of ProjectWise.

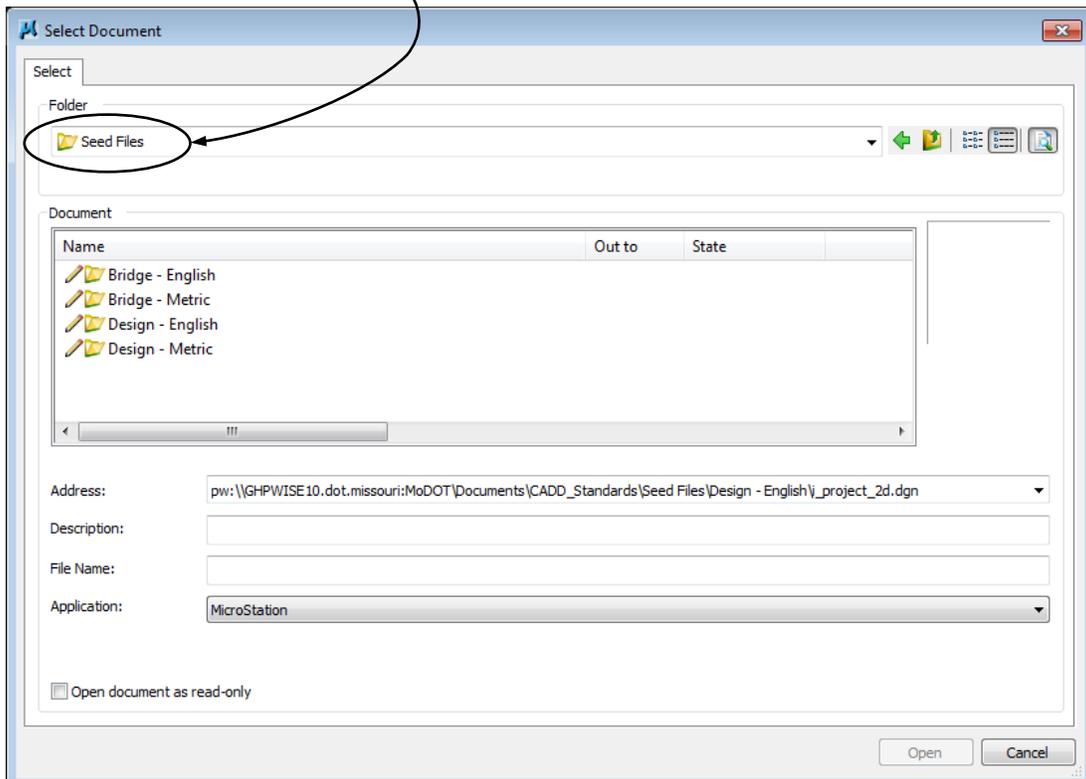
To create a new document based on an existing ProjectWise document's file, click *Seed*.



Navigate to the *CADD_Standards* folder.

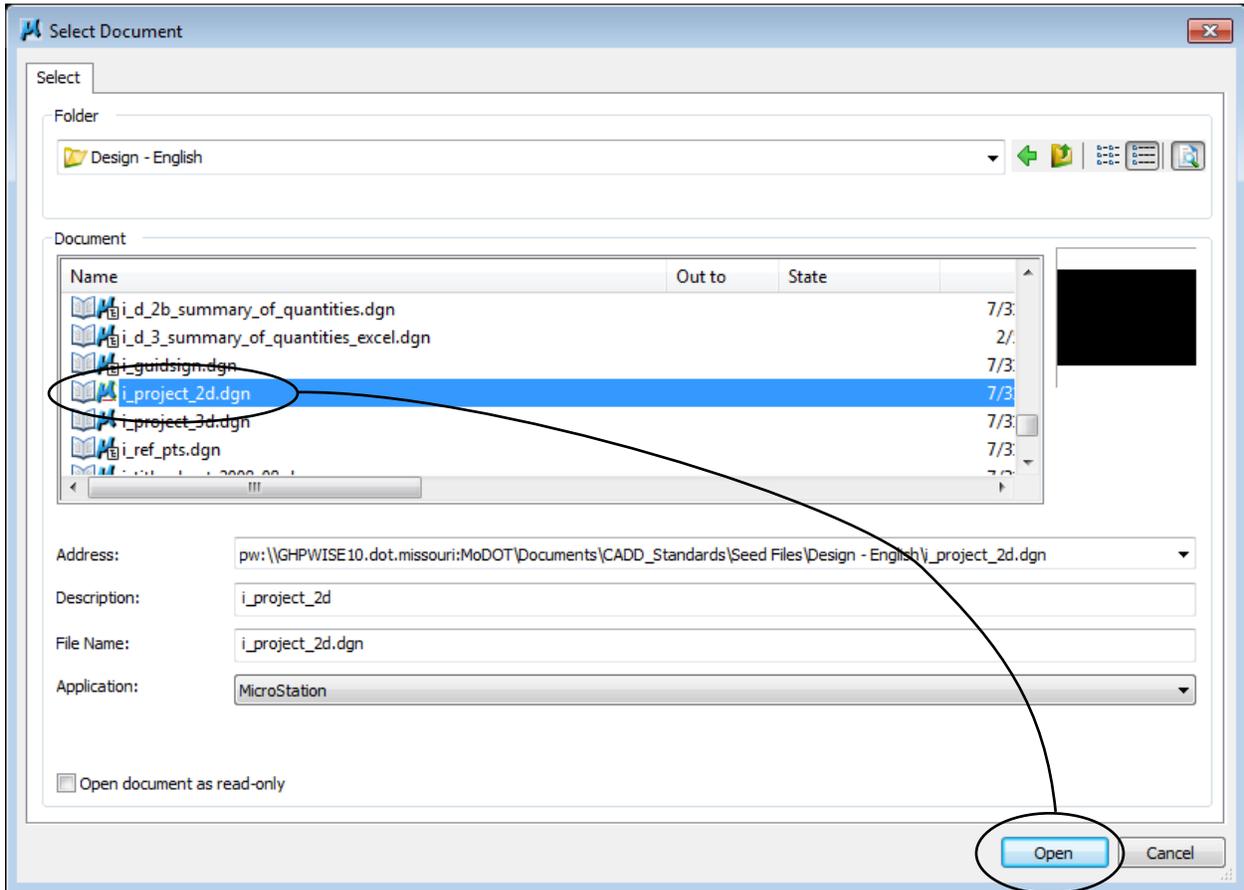


Navigate to the *Seed Files* folder.

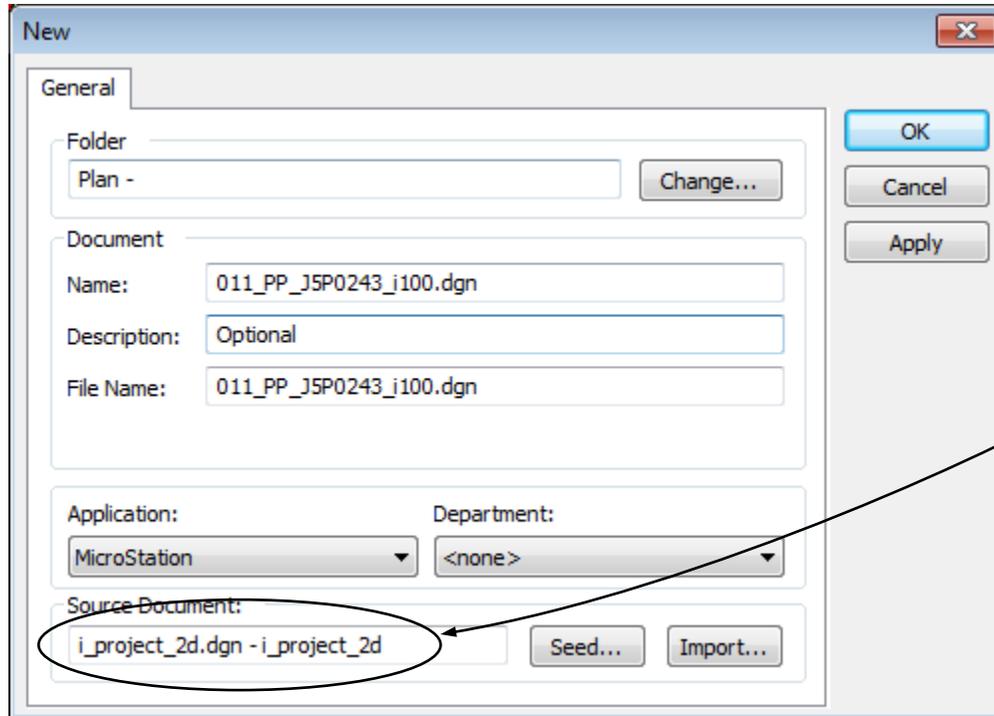


Open the *Design – English* folder.

Select the document to be used as a seed file, and click *Open*.

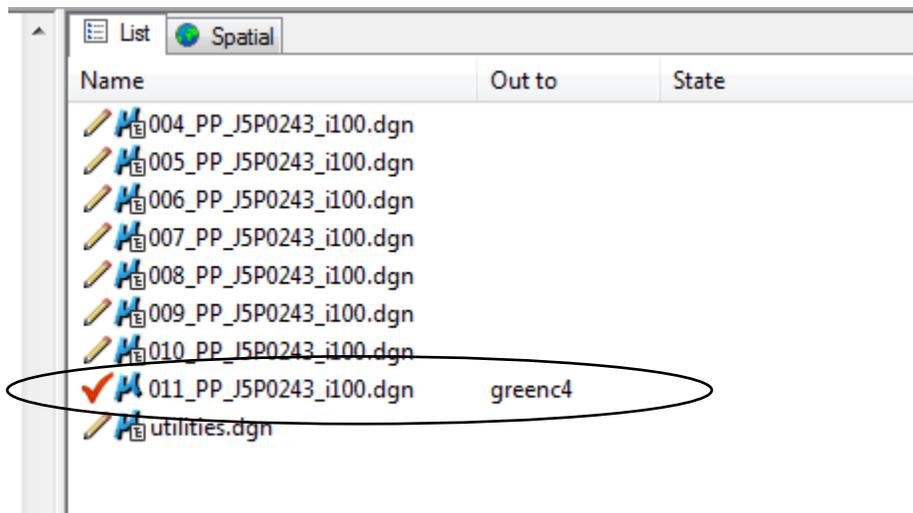


The seed document's name and description display in the New dialog box's Source Document section.

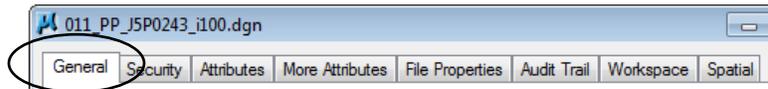


Click the *OK* button and MicroStation will open the newly created document.

ProjectWise also now lists the file name and the Out To column shows your userid.



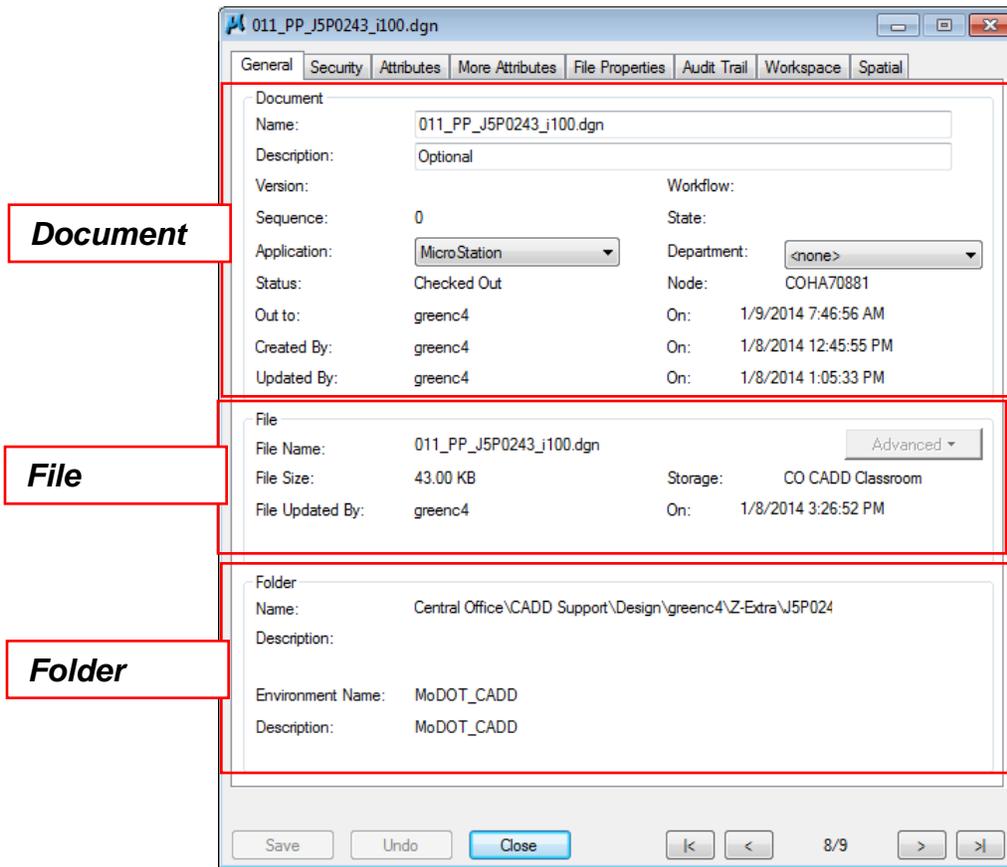
General tab



This tab displays information about system attributes. These attributes are related to the management of the document. Some of these are editable and some are not.

System Attribute	Editable
Document	
Name	Yes
Description	Yes
Version	No
Sequence	No
Application	Yes
Status	No
Out to	No
Created/updated by	No
Workflow	No
State	No
Department	Yes
Node	No
File	
File name and size	No
Updated by	No
Storage	No
Dates	No
Folder	
Name and description	No
Environment name	No
Environment description	No

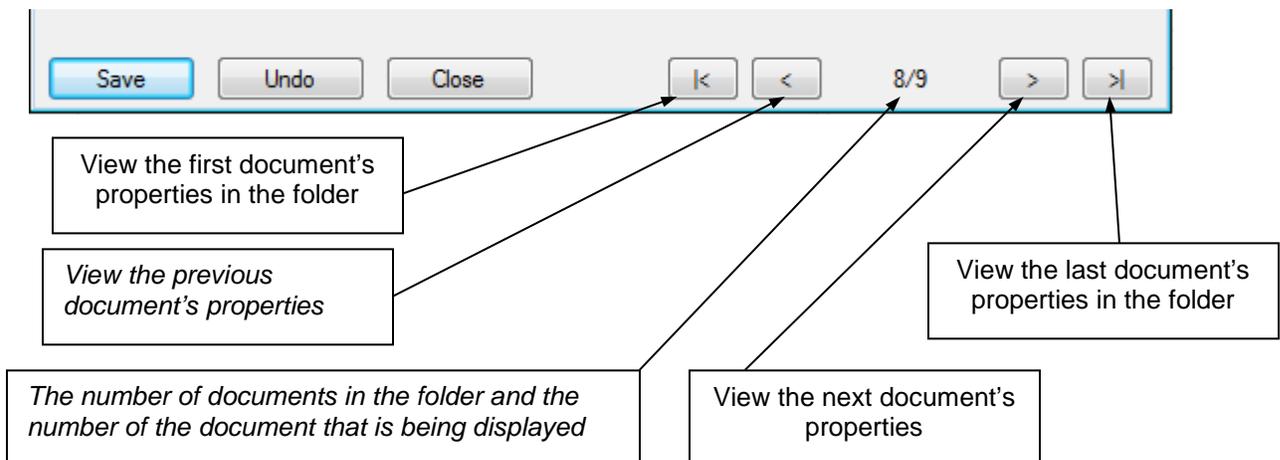
WARNING: If you change the application, the selected application will be used to open the file.



Example of a document's Document Properties

General document properties

The *Document Properties* dialog box has tabs across the top and buttons across the bottom. The buttons across the bottom will allow the user to Save, Undo, Close, view the previous document's properties, view the first document's properties in the folder, view the next document's properties or view the last document's properties in the folder.



The *Document* is the server “placeholder” name. This is the name that the Oracle server will use and the name that the user will see in the ProjectWise Explorer.

Document section

Document			
Name:	011_PP_J5P0243_i100.dgn		
Description:	Optional		
Version:	Workflow:		
Sequence:	0	State:	
Application:	MicroStation	Department:	<none>
Status:	Checked Out	Node:	COHA70881
Out to:	greenc4	On:	1/9/2014 7:46:56 AM
Created By:	greenc4	On:	1/8/2014 12:45:55 PM
Updated By:	greenc4	On:	1/8/2014 1:05:33 PM

Name - Sets the display name for the document. The Name field is limited to 127 characters.

Description - Used to provide an optional description of the document. The Description field is limited to 127 characters.

Version - Displays the version of the selected document. |

Sequence - Displays the number in which the document falls in the sequence of versions.

Application - Sets the application to be associated with the current document.

Workflow - Displays the name of the workflow that is applied to the folder containing the selected document. If no workflow is applied to the folder, this field is blank.

State - Displays the state of the workflow that the selected document is in. If no workflow is applied to the folder, this field is blank.

Department - Sets the department to be associated with the current document.

Status - Displays the status of the selected document (Checked In, Checked Out, Exported, Final, Not Checked In, Not Checked Out, Not Exported, or Not Final). This field is blank before the document is created; immediately after creation, the status of the document is Checked In.

Node - Displays the name of the computer to which the selected document is checked out or exported. This field is blank if the document is in any other status.

Out to/Final by - Displays the user name of the user who has checked out, exported, or set final status on the selected document.

On (Status last changed) - The On field to the right of the Out to/Final by field displays the time and date the document's status was last changed.

Created By - Displays the name of the user who created the document.

On (Created) - The On field to the right of the Created By field displays the time and date the document was created.

Updated By - Displays the name of the user who last modified the selected document. If the document has not been modified since it was created, this field displays the user name of the user who created the document.

On (Updated) - The On field to the right of the Updated By field displays the time and date the document was modified. If the document has not been modified since it was created, this field also displays the time and date the document was created.

File section

File			
File Name:	011_PP_J5P0243_j100.dgn	Advanced ▾	
File Size:	43.00 KB	Storage:	CO CADD Classroom
File Updated By:	greenc4	On:	1/8/2014 3:26:52 PM

File Name - Displays the name of the file attached to the selected document. If no file is attached to the selected document, this field is blank.

File Size - Displays the amount of disk space the attached file occupies.

File Updated By - Displays the user name of the user who last modified the file attached to the selected document.

Storage - Displays the selected document's folder's storage area. Every folder is associated to a storage area, which determines where the server copies of the ProjectWise files are stored.

On (File Updated) - The On field to the right of the File Updated By field displays the time and date the file attached to the selected document was last updated.

Folder section

Folder	
Name:	Central Office\CADD Support\Design\greenc4\Z-Extra\J5P024
Description:	
Environment Name:	MoDOT_CADD
Description:	MoDOT_CADD

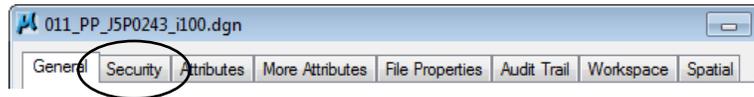
Name — Displays the name of the folder the selected document is in, or the folder you are in when you create a new document. If you are viewing the properties of an existing document, the Change button is disabled. If you are creating a new document, clicking the Change button allows you to select a different folder in which to create the document.

Description — Displays the description of the containing folder, if one exists.

Environment Name — Displays the name of the environment that is applied to the folder containing the selected document. The environment determines which attributes display on the Attributes and More Attributes tabs.

Description (Environment) — Displays the description of the folder's environment. This field is blank if no description exists.

Security tab



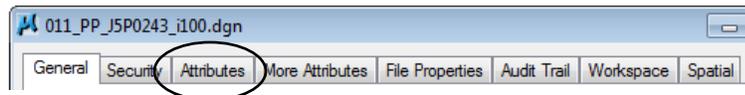
The document security type and properties can be viewed or changed on the security tab. If no security is set, then everyone has complete access to the document. If there is at least one access control set on the document, then any individual or group that is not given explicit access is denied access to a document.

Permissions are assigned as follows.

Permission	Document Rights
Full control	You can perform every document function
Change permissions	You can change document permissions
Delete	You can delete documents
Read	The document is visible in Documents window, you can view the document's properties and attributes
Write	You can modify document properties and attributes
Change Workflow State	You can change the workflow state of the document
File Read	You can open the document's file in Read-only. You can copy out the document, but not check it out
File Write	You can modify the document's file. You can check out the document, make changes and check it back in
Free	You can free the document, even if someone else has the document checked out or export out in there name.
No Access	You have no access to the document

Whether you can change these settings depends on the rights granted by your administrator and possibly by the owner, or Manager, of the document.

Attributes tab



The *Attributes* tab allows the user to plug in values that pertain to a specific project.

Entering the project data in the *Title Block Exchange* section will allow the PDF file for contract plans to generate properly and to the correct location.

A screenshot of the 'Attributes' tab in the software. The window title is '011_PP_J5P0243_i100.dgn'. The 'Attributes' tab is active. The form is divided into two main sections: 'Title Block Information' and 'Project Information'.
Title Block Information:
* District Name: Central (dropdown)
* Job Number: 5P0243 (dropdown)
* Scale: 1"=100' (dropdown)
Route: 7 (text field)
Sheet #: | (text field)
* PDF Create A, A - Portrait or D: D (dropdown)
Contract ID: (text field)
Project Manager: (text field)
Project Number: (text field)
County: Camden (text field)
Bridge Number or Project Stages: (dropdown)
District #: 4 (text field)
Project Information:
Project Surveyor: (text field)
Grid to Ground Factor: (text field)
Length of Project: 2.800000 (text field)
Begin Township: (text field)
Range: (text field)
Section: (text field)
At the bottom, there is a note: '* Required Fields For Contract Plans'. The bottom of the window has buttons for 'Save', 'Undo', 'Close', and navigation arrows. The page number '8/9' is also visible.

Project Information

* **District** allows a user to choose the project's District.

* **Job Number** allows a user to select the job number from a pull down list.

Route information is automatically populated after choosing the *Job Number*.

Sheet # will fill in the title block sheet number when the user plugs in that number.

Contract ID can be filled out in this input field and will also show on the plan sheet title block.

Project Number can be filled out in this input field and will also show on the plan sheet title block.

County is automatically populated after choosing the Job Number.

** **Bridge Number** needs to be filled out for Bridge Plans.

Title Block Information

A screenshot of the 'Title Block Information' section of the form. It contains the following fields:
* District Name: Central (dropdown)
* Job Number: 5P0243 (dropdown)
Route: 7 (text field)
Sheet #: (text field)
Contract ID: (text field)
Project Number: (text field)
County: Camden (text field)
Bridge Number or Project Stages: (dropdown)

* **Scale** applies the English or Metric scale of the project. This field is a required input field for producing the Adobe Acrobat PDF Contract Plans.

* **PDF Create A or B** allows the user to create and Adobe Acrobat PDF in an A size (8 ½" x 11") or a B size (11" x 17").

Project Manager is automatically populated with the Project Manager's name after choosing the *Job Number*.

* Scale
1"=100'

* PDF Create A, A - Portrait or D
D

Project Manager

* Indicates a field that is required to be filled in for creation of Contract Plan PDF files.

** Indicates an additional field to be filled in by the Bridge division for creation of Contract Plan PDF files.

Project Information

Project Information

Project Surveyor	Grid to Ground Factor	Length of Project
<input type="text"/>	<input type="text"/>	2.800000
Begin Township	Range	Section
<input type="text"/>	<input type="text"/>	<input type="text"/>

Project Surveyor allows the input of the name of the Surveyor for the project.

Grid to Ground Factor

Length of Project will populate the value if the value has been entered into the Oracle database.

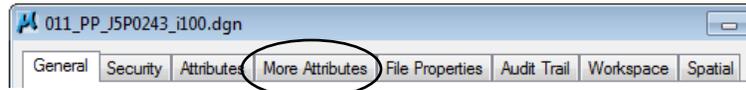
Begin Township allows the input of the beginning Township that the project is located.

Range allows the input of the Range.

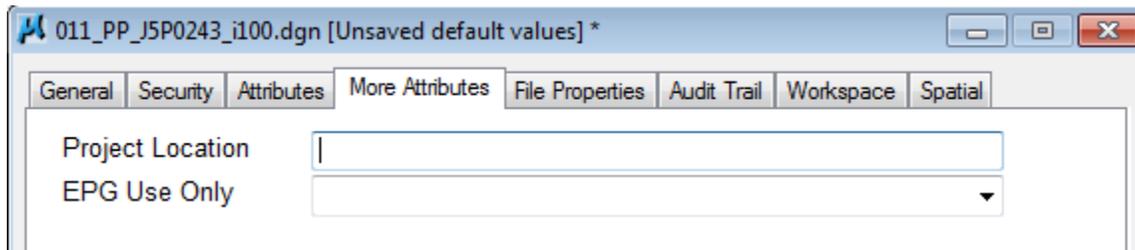
Section allows the input of the Section.

NOTE: The Attribute tab is explained in more detail in Section 4 – PDF Generation Process for Final Contract Plans, Preliminary Plans and R/W Plans for purposes at MoDOT.

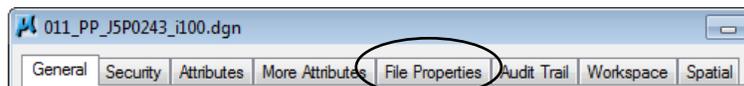
More Attributes tab



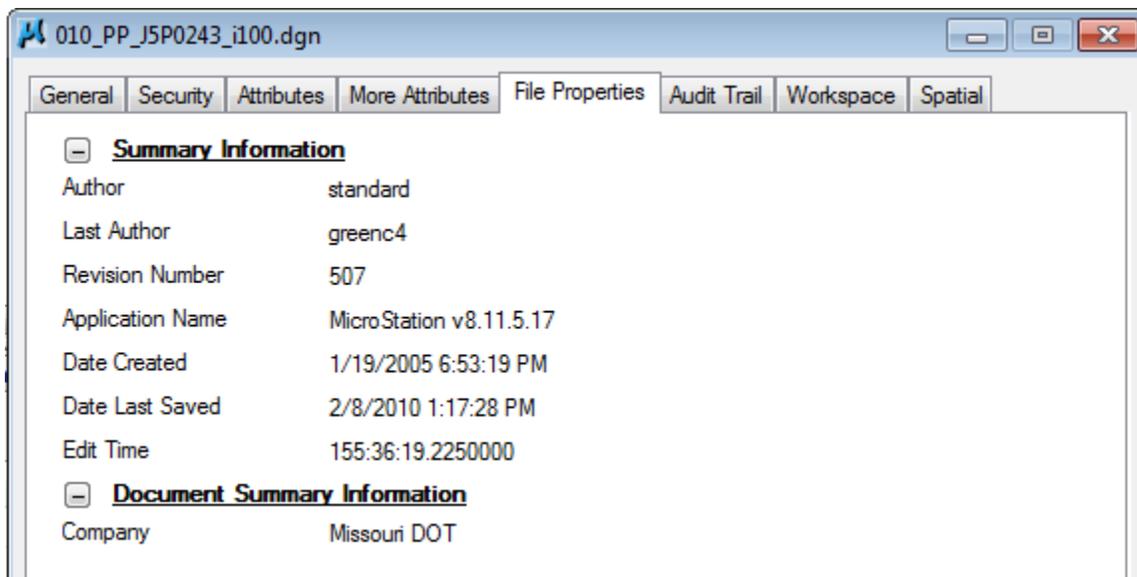
This tab will allow for additional attributes to be added in the future.



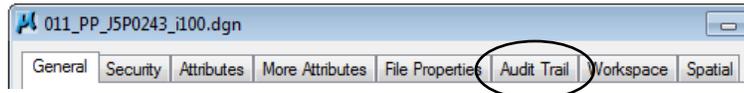
File Properties tab



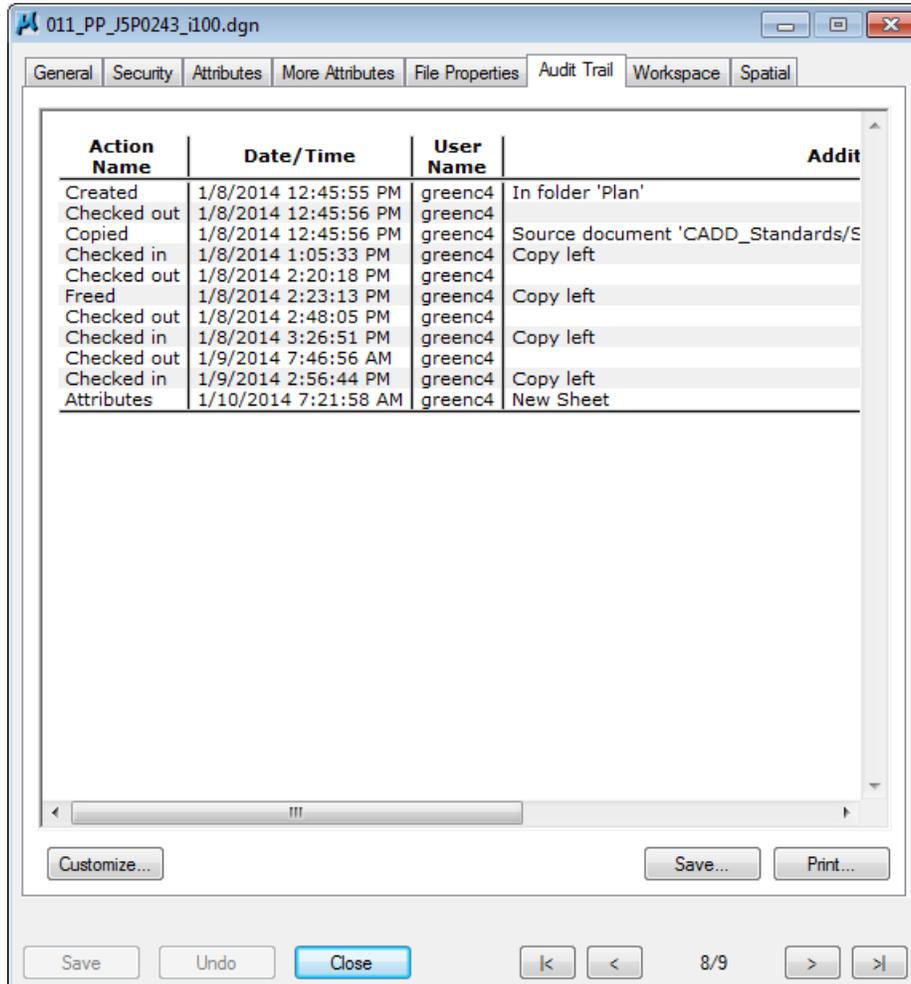
This tab lends information about the particulars of a file.



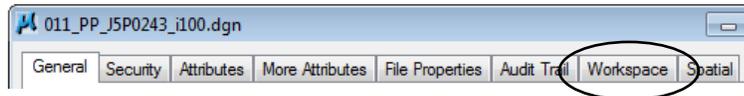
Audit Trail tab



A document's audit trail provides you with a list of all activities that have taken place for the document. An audit trail record is created as an action or activity takes place.



Workspace tab



This tab lets you assign a workspace profile to the folder or project.

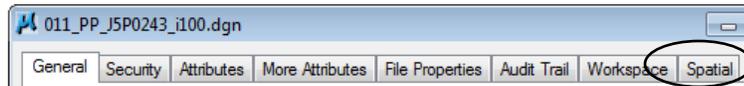
- **Workspace type** - Sets the Workspace type as created by the ProjectWise Administrator
- **Workspace Profile** - Lists the MicroStation profiles that can be assigned to the document so the documents will open with the correct linestyle resource files.

A screenshot of the software interface showing the 'Workspace' tab. The 'Workspace Profile' dropdown menu is open, displaying a list of profiles. The profile 'English - 1" = 100' Line Style Scale' is highlighted in blue. A black arrow points from this profile to the 'Workspace Profile' dropdown menu in the main window. The main window also shows a table with columns 'Property' and 'Value'.

Workspace Profile:

- <none> (Inherit)
- Bridge Projects
- English - 1" = 1' Line Style Scale
- English - 1" = 5' Line Style Scale
- English - 1" = 10' Line Style Scale
- English - 1" = 20' Line Style Scale
- English - 1" = 30' Line Style Scale
- English - 1" = 40' Line Style Scale
- English - 1" = 50' Line Style Scale
- English - 1" = 60' Line Style Scale
- English - 1" = 100' Line Style Scale**
- English - 1" = 200' Line Style Scale
- English - Title Sheet Line Style Scale
- Mapping - 1" = 1' Scale (No Custom Lines)
- Mapping - 1" = 100' Scale (No Custom Lines)
- Mapping - 1" = 200' Scale (No Custom Lines)
- Mapping - 1" = 300' Scale (No Custom Lines)
- Mapping - 1" = 400' Scale (No Custom Lines)
- Mapping - 1" = 500' Scale (No Custom Lines)
- Mapping - 1" = 600' Scale (No Custom Lines)
- Mapping - 1" = 700' Scale (No Custom Lines)
- Mapping - 1" = 800' Scale (No Custom Lines)
- Mapping - 1" = 900' Scale (No Custom Lines)
- Mapping - 1" = 1000' Scale (No Custom Lines)
- Mapping - 1" = 1200' Scale (No Custom Lines)
- Mapping - 1" = 1500' Scale (No Custom Lines)
- Mapping - 1" = 1600' Scale (No Custom Lines)
- Mapping - 1" = 2000' Scale (No Custom Lines)
- Mapping - 1" = 2400' Scale (No Custom Lines)
- Mapping - 1" = 2600' Scale (No Custom Lines)

Spatial tab



This tab controls what spatial data is applied to the document, such as an aerial background map, coordinate system and source. MoDOT currently doesn't have spatial database setup for production.

