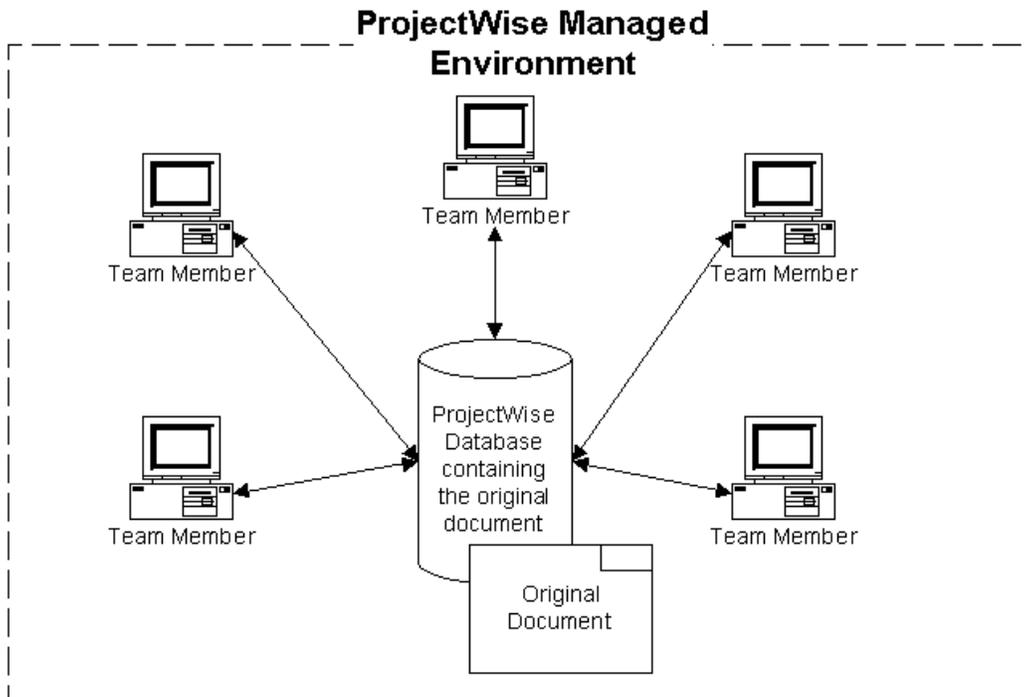




ProjectWise The Managed Environment

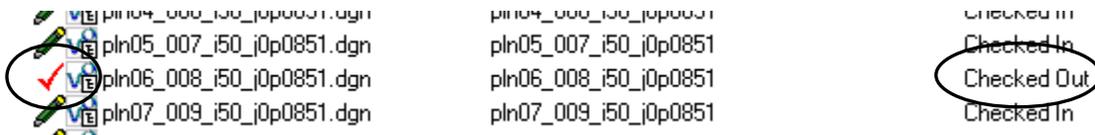
ProjectWise is the document management system that is mainly used for document storage for highway and bridge plans at MoDOT. ProjectWise allows users to access documents from the single database. During projects involving a number of sites, a single instance of a document is available to every member of the project team.



The document is stored in a location accessible to all team members. It can be viewed by all users, but checked out by only one user at any time.

Check out and check in

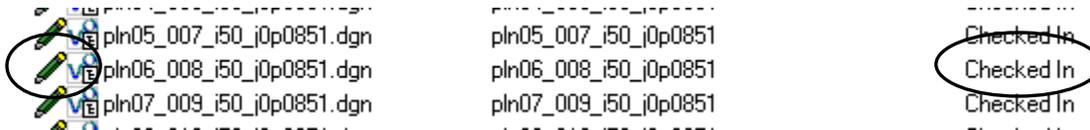
When a team member wants to edit a document, they can check it out simply by opening the document within the ProjectWise Explorer. When they check out a document, it is placed into their local working directory located on their hard-drive and the database record is marked accordingly.



The database has been marked with a red checkmark showing that the document has been checked out.

This places the document at the full disposal of that team member. While the drawing is checked out, other team members can view the document but cannot make any changes to it.

At the end of the workday, when another team member needs access to the file, or when all work is completed, the document is checked in. This makes it available for edit by other team members.



A user can always refresh the server's copy so that other team members can view or reference the latest version. See Chapter 5 *Updating documents in ProjectWise without checking them in*.

Controlled Access

ProjectWise is a controlled access system. Project participants are assigned rights to various documents, and these rights can change at various stages throughout the project.

There are five broad levels of access when using the ProjectWise Explorer.

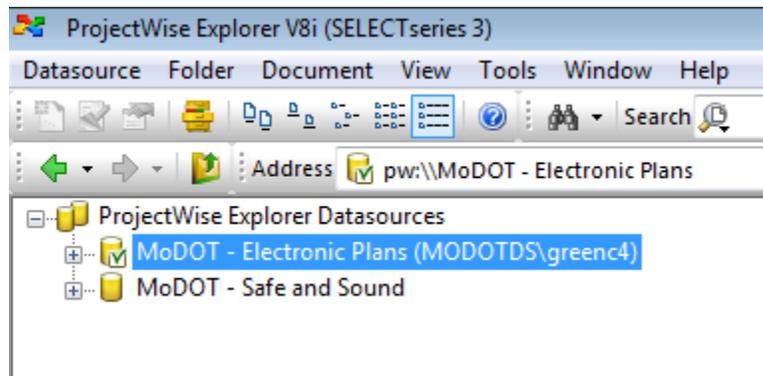
- No access: The folder structure or documents cannot be seen at all.
- Viewing access: The folder structure or document file names and properties can be seen in ProjectWise, but document content cannot be viewed.
- Read access: A document may be opened read-only. No changes can be made to the document.
- Commenting or redlining access: A document can be opened read-only. Comments can be made about the document, but no changes can be made to the content.
- Editing access: A document can be opened and edited.

User settings and access controls are an administrative function of ProjectWise. The administrator will define these settings in advance.

Logging in to ProjectWise Explorer

ProjectWise allows the use of Windows domain user names and passwords. Here at MoDOT, the single sign on is enabled and configured for a datasource. Therefore it allows Windows domain users to log in to ProjectWise without entering their Windows domain user name and password after the first time. They simply double click on the name of the datasource.

When you log in, ProjectWise verifies your user name and password and determines your access rights. These access rights depend on your user group assignment, the user settings assigned to you by the administrator, the security on a particular folder or document, and possibly the state of a workflow to which a document is currently assigned.



NOTE: As in most Windows applications, there are several ways to issue a command or perform an action. If in doubt, you can always check the Help file or press F1.

Working Directories

ProjectWise copies the files that you work on to your local hard drive. This area is called your working directory. It contains temporary copies of the document files that you checked or copied out from a ProjectWise server. Applications launched from ProjectWise Explorer will use these files automatically.

WARNING: Never directly delete the directories or files created by ProjectWise from Windows Explorer. Deleting these folders or files can cause data loss. To maintain your working directory, use the organizer tool or the check in and purge commands.

IMPORTANT: Always check documents out from ProjectWise. Working on local copies may result in data loss, as others may make changes to the document within ProjectWise and those changes will not be added to your local copy.

The Datasource Tree

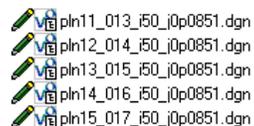
Icons are as follows in the datasource tree.

-  The ProjectWise datasources header. All datasources are listed under this icon.
-  An individual datasource that you are logged into.
-  An active, open datasource. This datasource is the one you are currently working with. There can only be one of these.
-  A datasource that is open but not active. You are logged into this datasource, but the focus is on another datasource.
-  An unavailable datasource.
-  A folder or sub-folder. You will not see folders that you do not have view access to.
-  Saved Searches root level node. There may be one or more search folders below this node.
-  Saved Searches global folder. Only the datasource administrator can amend items in this folder.
-  Saved searches personal folder. Each user has their own personal folder. The ProjectWise administrator may or may not have enabled this feature.
-  Indicates that a personal folder contains a saved search. The ProjectWise administrator may or may not have enabled this feature.

The Documents Window

When you select a folder, its contents are displayed in the documents window. If you do not have the necessary permissions to a document or sub-folder, the document or sub-folder will not appear in the documents window.

Each document has two icons associated with it. The first icon indicates the general permissions and current status for the document. The second icon indicates the document's type and its associated application.



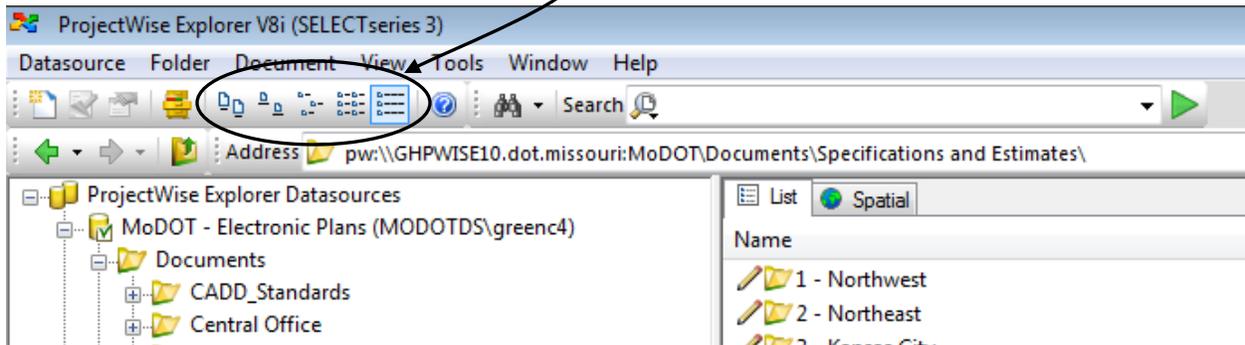
An example of the two icons described above.

Customizing ProjectWise Explorer

You can change the ProjectWise Explorer window to suit your preferences. This makes it easy to manage documents and to view and edit their properties. Each pane is resizable. When the details view is selected, the columns in the documents window are customizable as well. You can also create your own tool bars to hold tools that you use frequently. As with any Windows application, you can maximize, minimize or resize the window, as well as move the bars between the datasource tree, the documents window and the preview pane.

Changing the Documents window view type

You change the way documents are shown in the document pane by selecting different view types, just as you can in Windows Explorer.



This button will invoke the **Thumbnail Image** on the Standard tool bar, which displays thumbnail images for the documents in the selected folder.



This button will invoke the **Large** application icons on the Standard tool bar in horizontal rows, without details.



This button will invoke the **Small** application icons on the Standard tool bar in horizontal rows, without details.



This button will invoke the **List** on the Standard tool bar, which will show the Small application icons in vertical rows, without details.



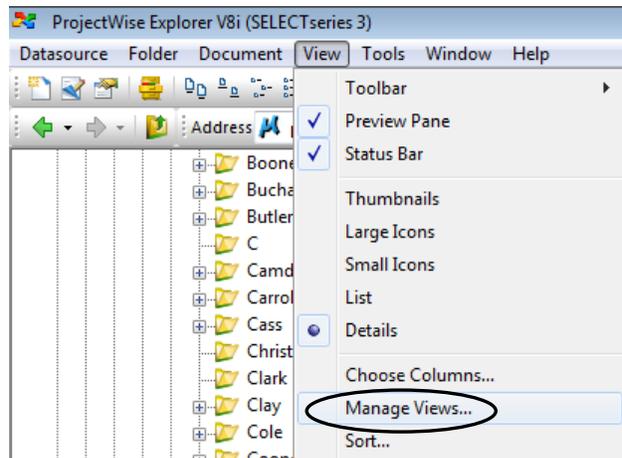
This button will invoke the **Details** on the Standard tool bar, which will show the Small application icons in vertical columns, including Details.

Showing additional information in the details view

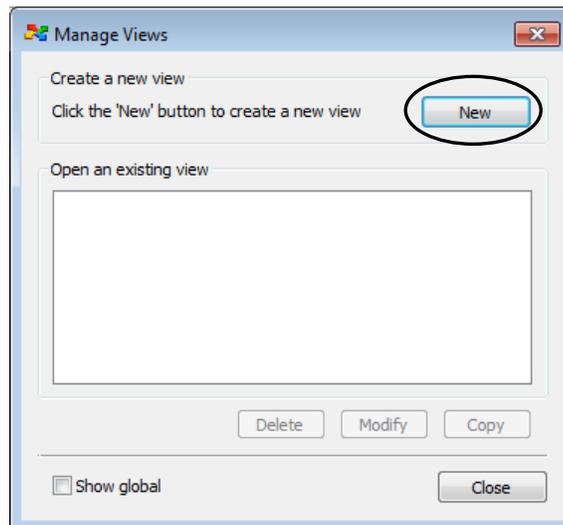
An environment is a collection of custom document attributes that can be defined by the ProjectWise administrator. The environment options in the Managed Views lets you add columns to view this custom information for documents assigned to a specific environment.

To create a **Managed View**:

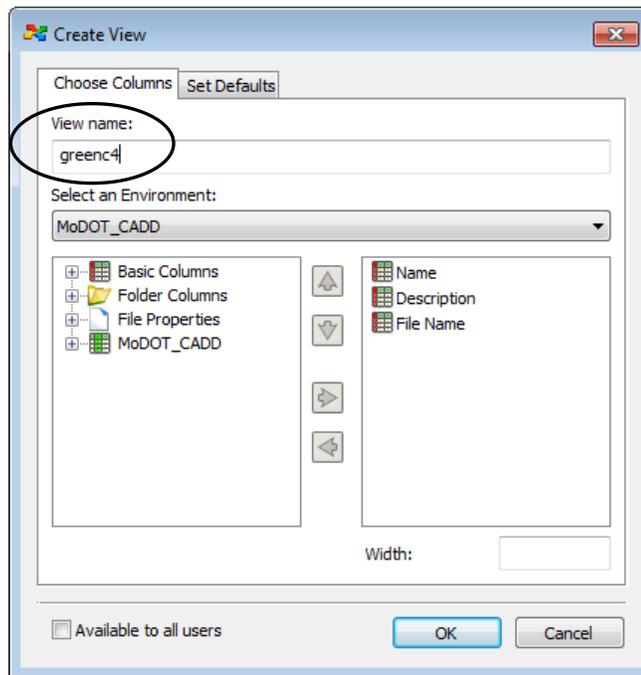
1. Select *View>Manage Views* from the ProjectWise Explorer main menu bar.



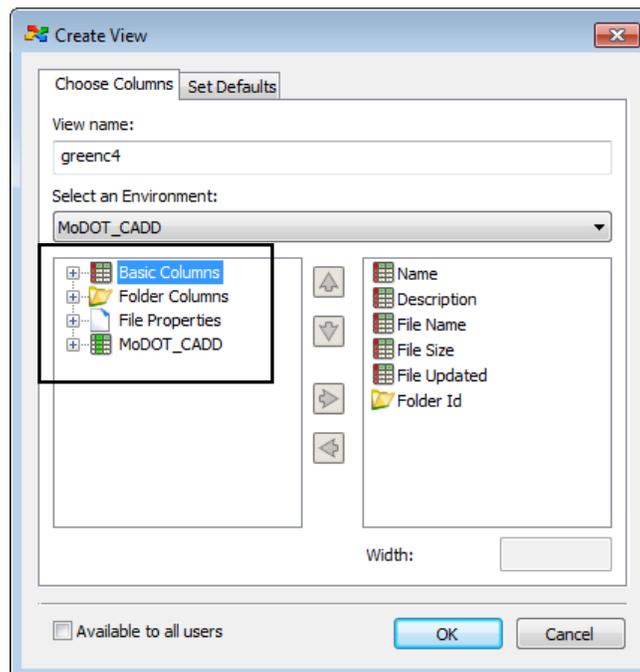
2. Click *New*.



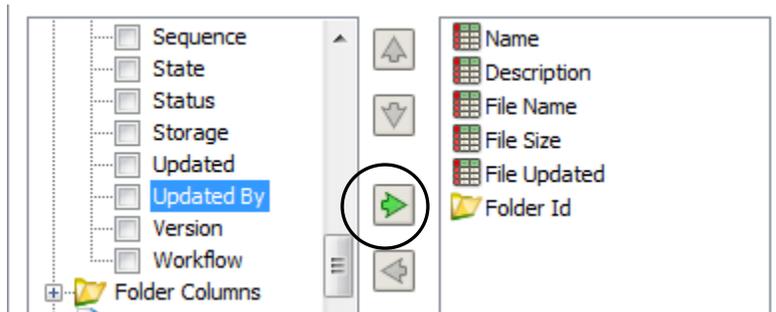
3. The *Create View* dialog box will open. In here, enter the desired name of the *View name* area. (MoDOT is the default view)



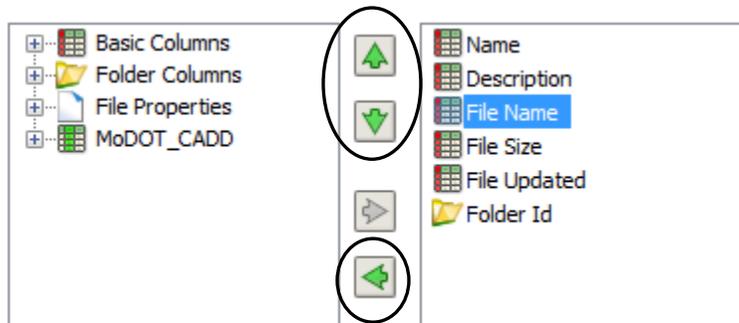
4. In the *Choose Columns* tab, expand one of options by clicking the plus sign.



To add a column, double click the column name or highlight the column name and then click the green arrow pointing to the Show Columns of pane.



To change the order in which the columns will be displayed, use the green up and down arrows. To remove a column, highlight it in the right pane and click the arrow pointing to the Available Columns pane or drag and drop back to the left pane.

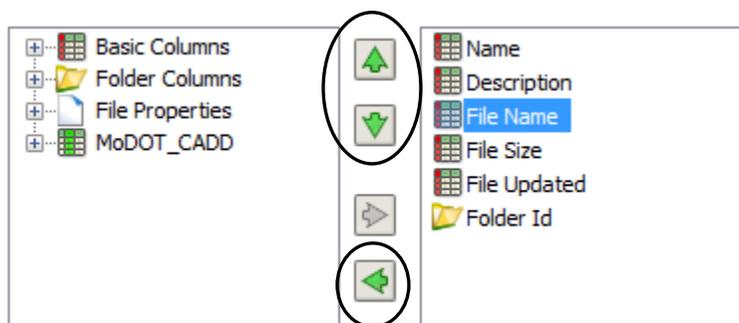


Once established, you can resize the columns by dragging the column headers' edges.

TIP: These defined views are stored locally on your system and will not be available to you on other systems. If you work on more than one system, you must have views defined on each.

5. Add the columns of your choice.
6. When the desired columns have been added, click the *OK* button. Finally *Close* out of the Manage View dialog.

To change the order in which the columns will be displayed, use the green up and down arrows. To remove a column, highlight it in the right pane and click the arrow pointing to the Available Columns pane or drag and drop back to the left pane.

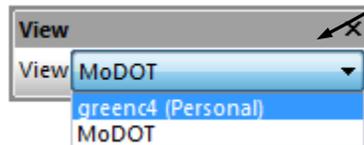


Once established, you can resize the columns by dragging the column headers' edges.

TIP: These defined views are stored locally on your system and will not be available to you on other systems. If you work on more than one system, you must have views defined on each.

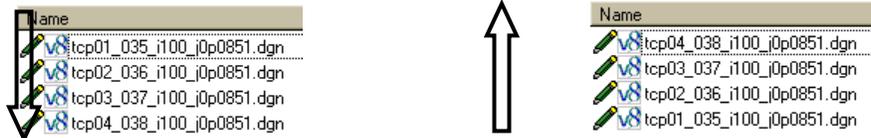
IMPORTANT: Here at MoDOT there will be a default view containing the following columns; Name, Out to, State, File Name, Application, File Size, Folder ID, County Name, Route No, Workflow, Folder GUID, Folder Name, and Folder Manager. You choose to use this or create a view of your own.

Clicking the pull down allows you to choose document views that have been predefined by an administrator or custom views that you have created.



Sorting documents in the documents window

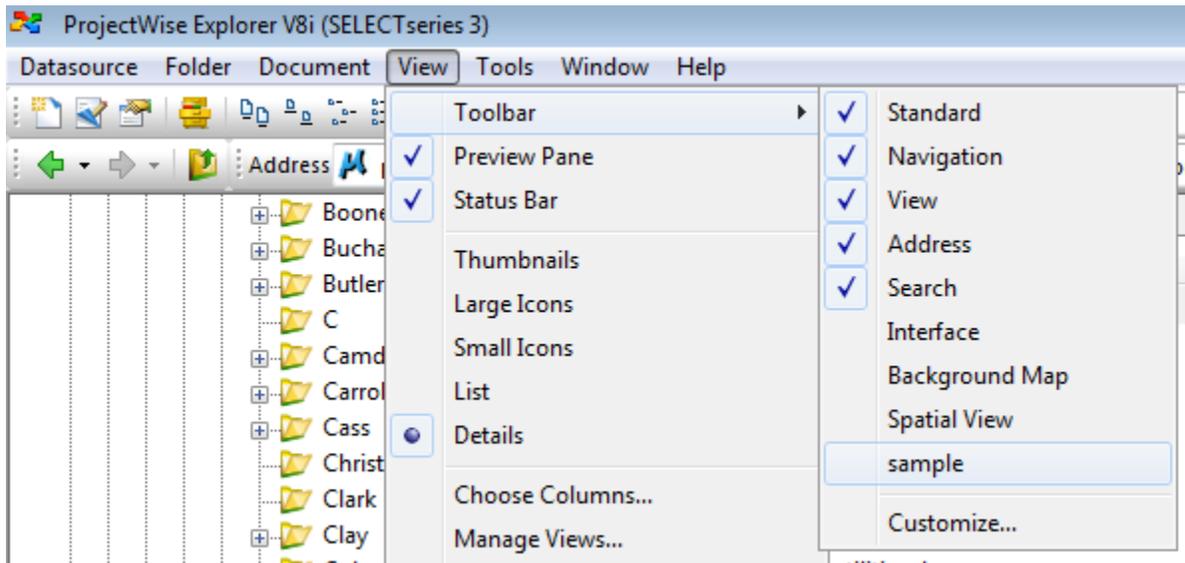
You can sort documents by an individual attribute by *clicking on the column heading*. *Clicking a second time* will reverse the order.



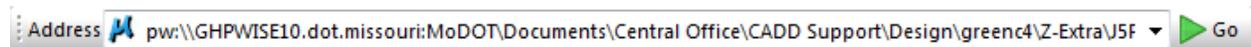
There is also a menu option that allows you to sort the document list based on as many of the displayed columns as you like. For instance, first by document name in ascending order and then by document version in descending order.

Tool and status bar options

You can toggle the display of the tool bars and the status bar by clicking the View pull down and selecting the Toolbar option. This will show the options.



Address toggles the display of the Address bar, which displays the full path to your location in the datasource, including the selected folder and document.

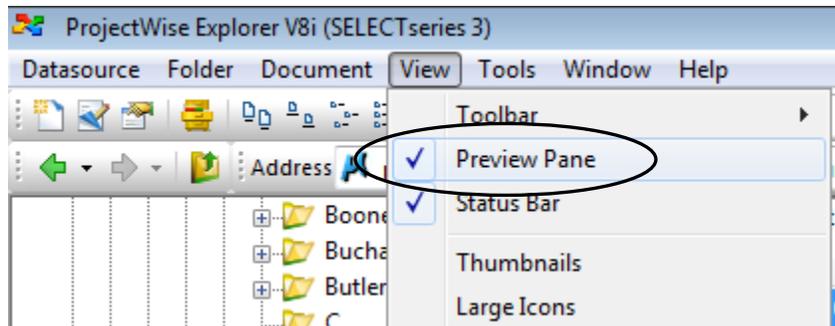


TIP: Text in the address bar can be cut and pasted into E-mail and sent to another ProjectWise user. They can cut and paste the address into their own ProjectWise Explorer address bar.

Using the preview pane

The preview pane gives you attribute information about a file or folder without having to open the Properties dialog box.

Selecting the *View* pull down will show the *Preview Pane* option. This will toggle the *Preview Pane* on/off.



When a folder is selected in the datasource tree, *Folder Properties* and *Access Control* are displayed.

Folder Properties		Access Control	
Property name	Property value	Property name	Property value
Folder Name	Plan	Folder Description	
Environment Name	MoDOT_CADD	Environment Description	MoDOT_CADD
Workspace Profile Name		Workspace Profile Description	
Storage	CO CADD Classroom	Owner	pwadmin
Created By	pwadmin	Creation Time	2/7/2008 7:40:48 AM
Updated By	pwadmin	Update Time	9/23/2009 10:12:08 AM
Workflow		State	
Document Count	8	Disk Usage	981.50 KB (1,005,056 bytes)
Parent Folder	Central Office\CADD Support\...		

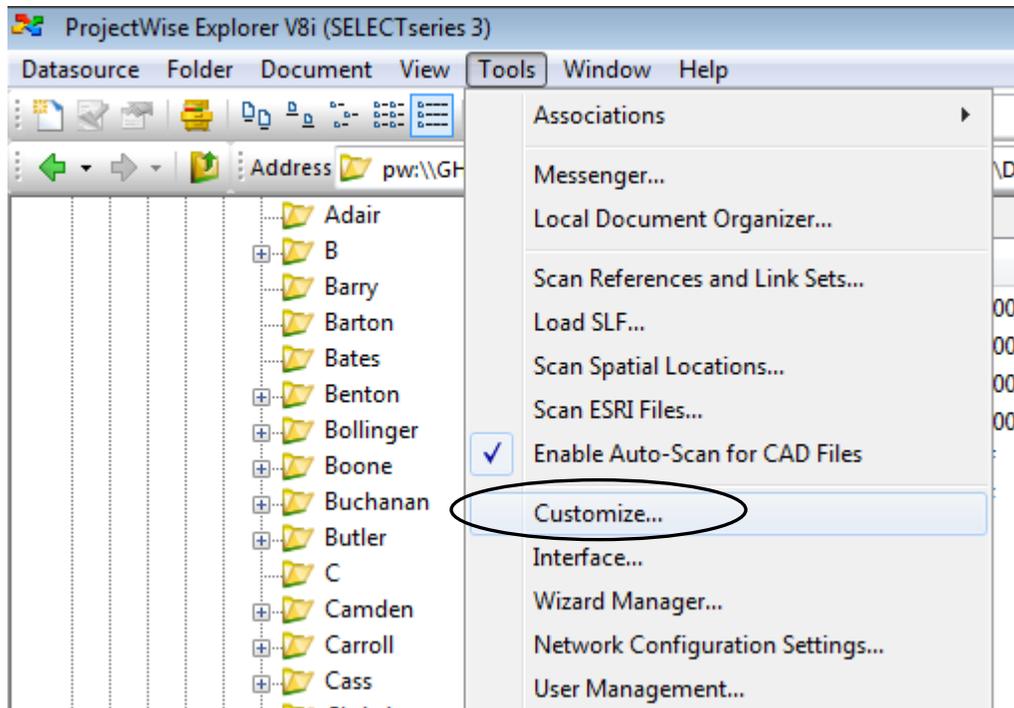
When a document is selected, *Document Properties* and *Photo Review* are also displayed. Switch between document and folder properties by clicking on the appropriate tab.

Document Properties		Folder Properties		Photo Preview		Access Control	
Property name	Property value	Property name	Property value	Property name	Property value	Property name	Property value
Name	004_PP_J5P0243_i100.dgn	Description	004_PP_J5P0243_i100.dgn				
Folder Name	Plan	Folder Description					
Environment	MoDOT_CADD	Storage	CO CADD Classroom				
File Name	004_PP_J5P0243_i100.dgn	File Size	123.50 KB (126,464 bytes)				
Workflow		State					
Created By	pwadmin	Created	2/6/2008 8:22:00 AM				
Updated By	pwadmin	Updated	2/7/2008 11:19:11 AM				
File Updated By	greenc4	File Updated	4/26/2010 1:14:20 PM				
Status	Checked In	Node					
Version		Sequence	0				
File Revision		Conflicts	False				
Local File Revision		Local File Refreshed					
Local File Directory		Local Status					
Shareable		MIME Type	image/vnd.dgn;ver=8				

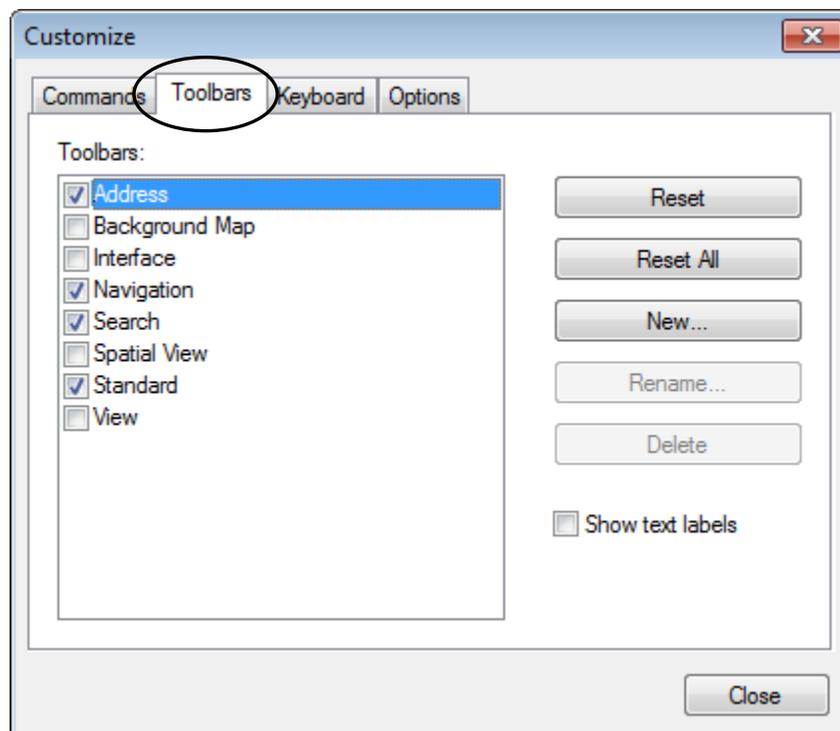
Custom tool bars

You can create additional tool bars for easy access to the commands that you use often.

Select the *Tools* pull down and then *Customize*.



This will open the *Customize* dialog box and allow you to select the *Toolbars* tab.



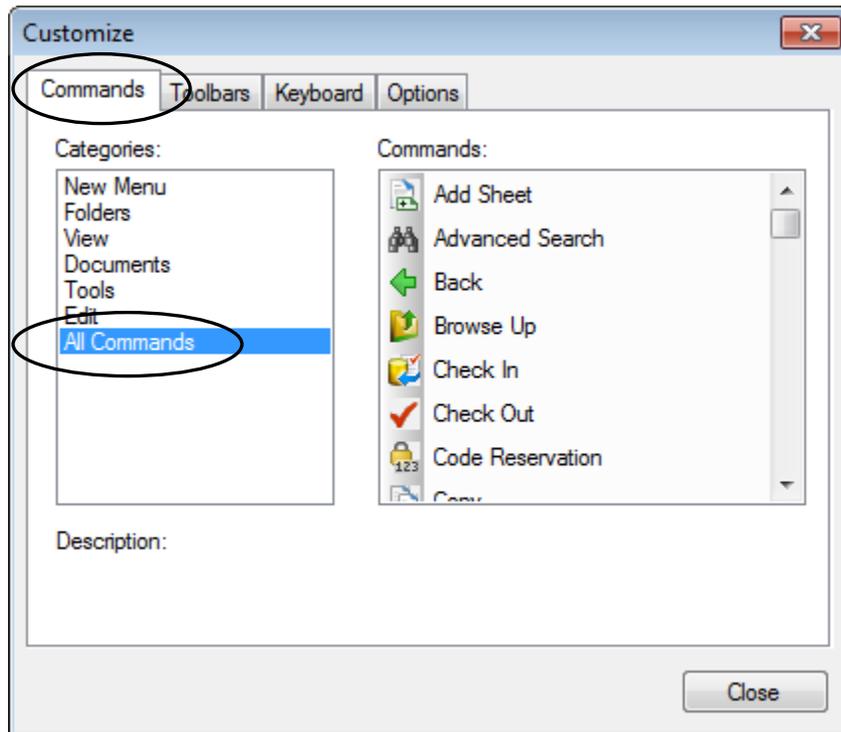
Click the *New* button and add a toolbar name in the input field.



This will bring up an empty tool bar.



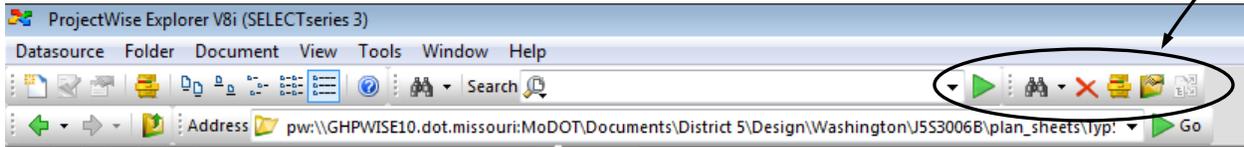
Also, you will have the *Customize* dialog box still out, select the *Commands* tab and click the *All Commands* category.



Now you can scroll down the list of commands and choose one. Click on the desired command(s), drag and drop it on the new tool bar. This will add the tool to the tool box.



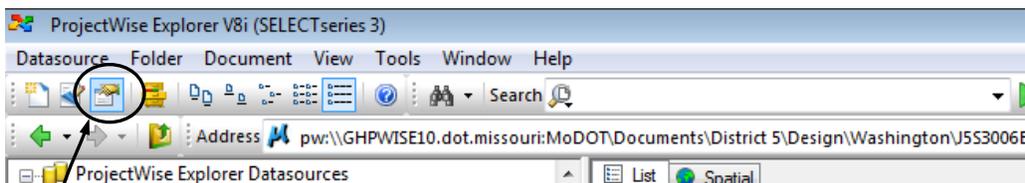
Once you have added as many commands as you want you can dock the tool bar at the top of the ProjectWise Explorer.



Once a tool bar is created you can edit it by opening the customize dialog box and adding or removing commands.

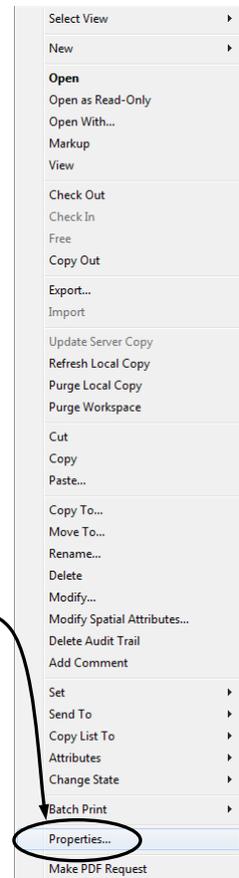
Document Properties

You can access a document's properties in a couple ways; click on the *Document Properties* icon or right click on the document and choose the *Properties* option.



Document Properties by icon

Document Properties by right clicking over the document



TIP: You can select the document and press the space bar to open the Properties dialog box.