
ProjectWise Basics

Design Manual
Chapter 21
Automation Tool
Instructions

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ProjectWise Introduction

ProjectWise is a Bentley Systems, Incorporated software suite for document management. The Iowa DOT uses the system for management of engineering documents, such as Microstation and Geopak files, Microsoft Office files, and other project related files. ProjectWise allows for easy collaboration amongst users across multiple geographic locations. ProjectWise makes the use of managed Microstation and Geopak workspaces to be configured so that any user, internal or external, can use the same workspace configuration when opening CAD drawings from the ProjectWise system.

How does ProjectWise work?

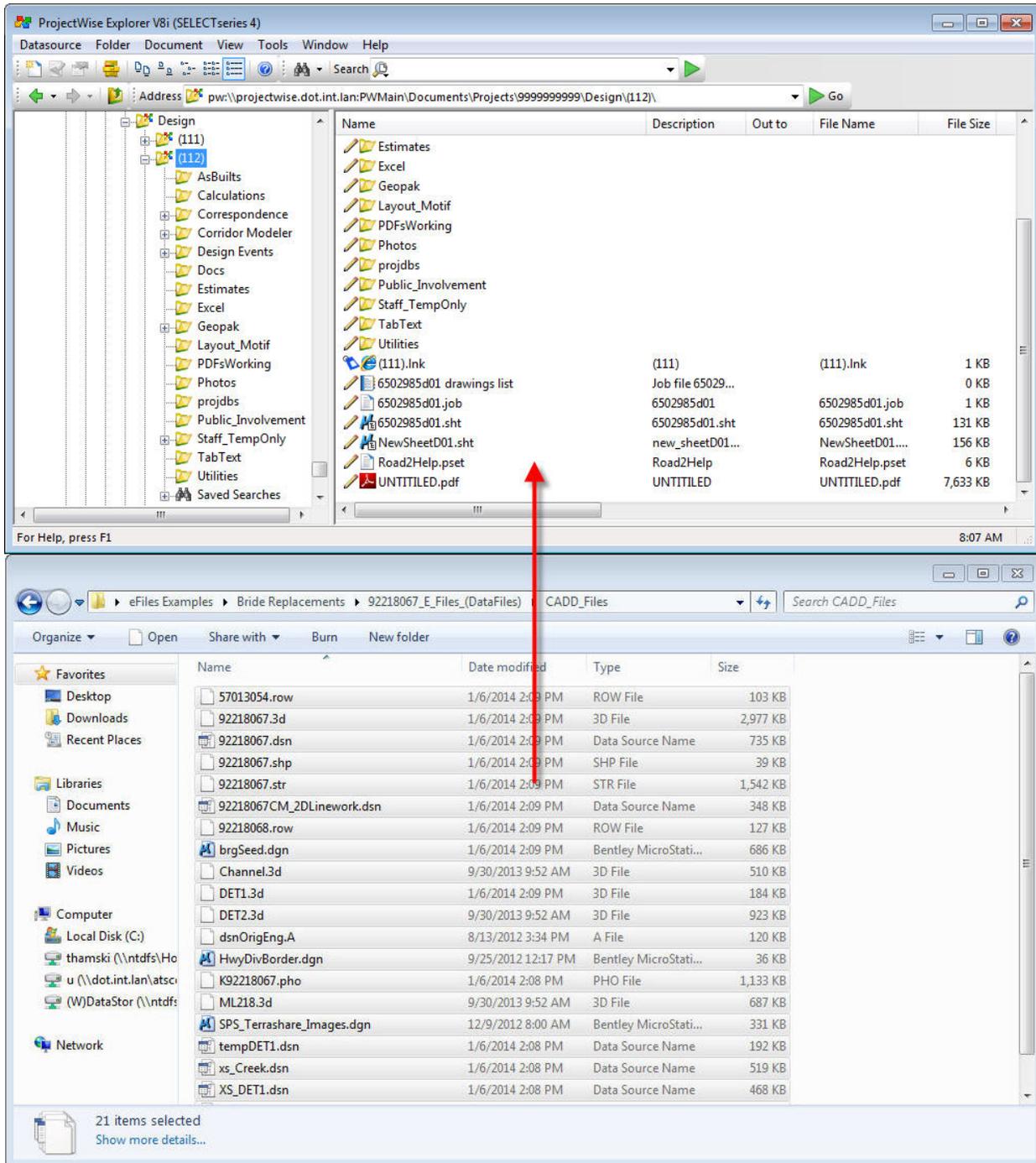
ProjectWise maintains a database of all documents contained in the system. Through the web portal or the ProjectWise Explorer client, you may view the contents of the datasource. When checking out (opening) a document from ProjectWise, the file and any workspace files needed are copied locally and opened from your computer.

Working in ProjectWise

ProjectWise is similar to Windows Explorer in that it allows navigation of folder structure, opening of files, searching for files, etc. Files can be opened directly from ProjectWise explorer or from software suites that have ProjectWise integration (Microsoft Office Suite and Bentley Microstation are two examples).

Placing existing files into ProjectWise Explorer

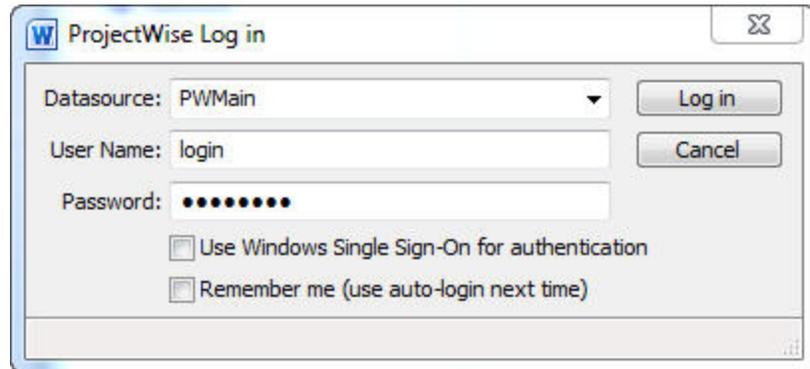
To place an existing document or documents into ProjectWise, simply *select* the folder or set of documents, then *click-and-drag-and-drop* the selected files from the Windows Explorer window to the ProjectWise Explorer window, as shown on the next page.



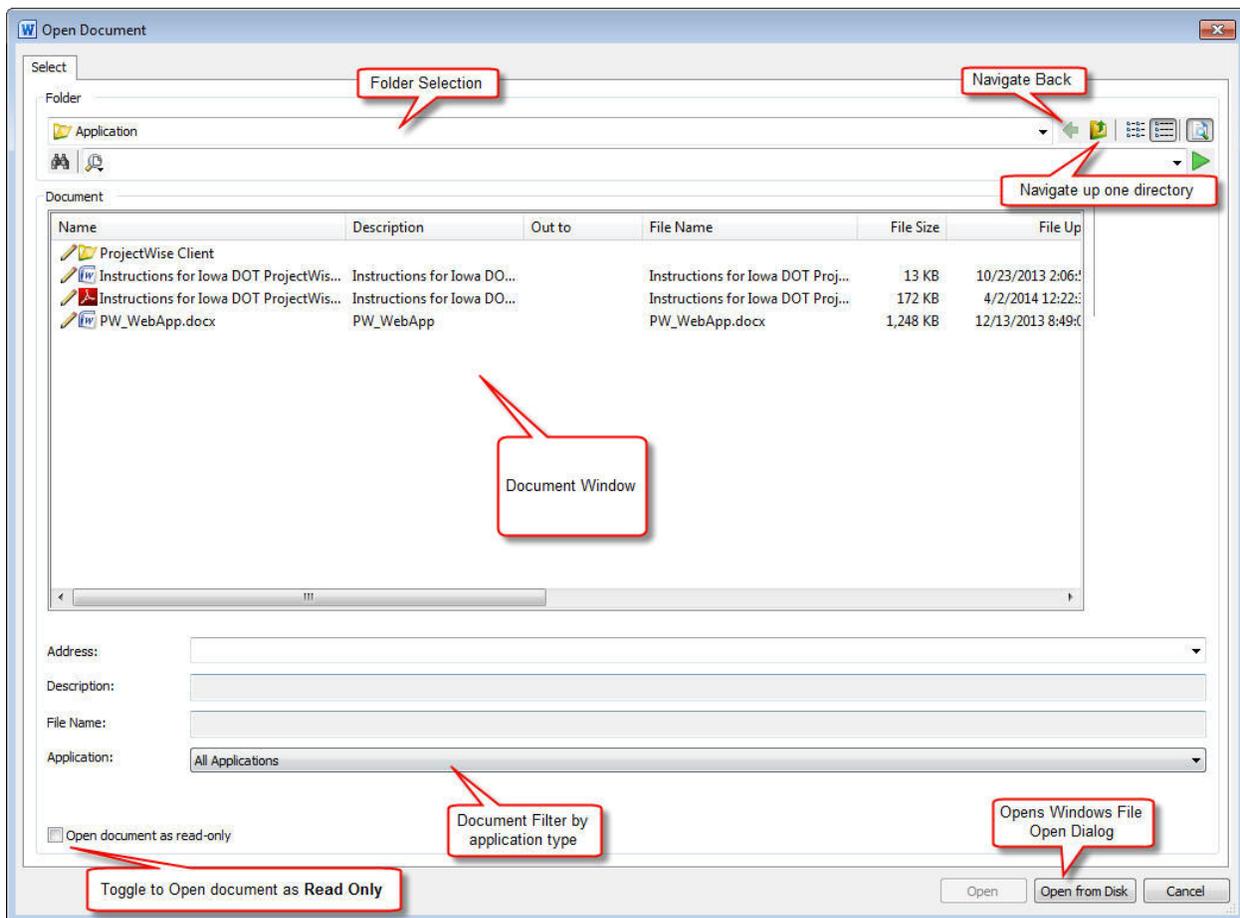
Opening and Closing Files in ProjectWise

Accessing ProjectWise documents from applications integrated with ProjectWise:

Upon opening a software suite that is integrated with ProjectWise, you may be prompted with the ProjectWise datasource selection and login screen, as shown on the right. To access documents from the Iowa DOT ProjectWise server, enter in your credentials to login to the Iowa DOT datasource **PWMain**. Otherwise, if you do not wish to access documents from ProjectWise, but instead from your computer's drives, simply *Click Cancel* to access the standard Windows File Open dialog.



The ProjectWise file open dialog is similar to the Windows file open dialog, as shown below.



To open a file from ProjectWise, simply select the file by *clicking* on it in the Document Window and then *Click* the **Open** button or *Double-Click* on the file name in the Document Window.

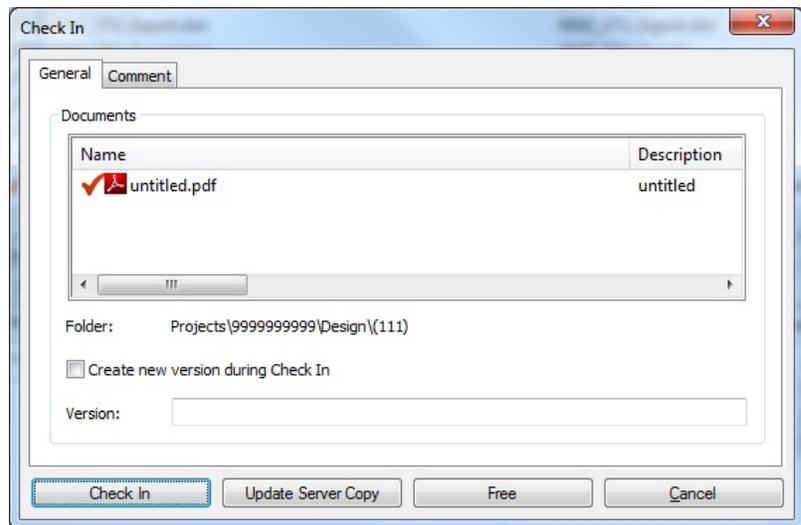
When you are finished working with a document, you have the choice to **Check In**, **Update Server Copy**, or **Free**, as explained below. You will be prompted to do this after closing the application in which the file is being worked on, when opening another file within integrated software, or when closing ProjectWise Explorer.

Note: You must *click Check In* to save any changes to the copy of the document on the server.

Check In: Saves any changes to the document that differ from the server copy. Releases the lock on the document to allow others to check it out.

Update Server Copy: Saves any changes to the document that differ from the server copy. Does not release the lock on the document, so it remains checked out to the user.

Free: Discards any changes made while the document was checked out. Releases the lock on the document to allow other users to check it out.



ProjectWise Explorer Document Icon Definitions

Within ProjectWise Explorer and its File Open dialog, there will be icons next to each file that indicate the status of the file to you. All of these icons are explained below:

Icon	Meaning
 Read/Write	The pencil icon indicates that the document is checked in, and you have permission to modify the document's properties. (Read and Write privileges) and/or you have permission to edit the document's attached file (File Read and File Write privileges)
 Read Only	The open book icon indicates that you have read-only access to the document, either because you have neither Write nor File write privileges for this document, or possibly because the document is a version.
 Locked	Document is either checked out or has been exported by another user. You can still open this document as read-only but will not see any changes from the user who has checked out the file until they have checked it back in or updated the server copy.
 Checked Out	Document is checked out to you and cannot be modified by other users.
 Exported	Document has been exported by you, saved to a local machine and locked to you.
 Final Status	Document has been set to Final Status, cannot be edited or modified by anyone unless Final Status has been removed by an administrator. The file can be opened as read only.

Chronology of Changes to Design Manual Section:

021F-010 ProjectWise Basics

1/7/2016	NEW New.
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