



# ProjectWise

## NCDOT ProjectWise Explorer User Guide

## What is ProjectWise Explorer?

- ProjectWise (PW) Explorer is the interface between the user and the PW datasource. It looks very similar to Windows Explorer and functions basically the same.
- It is used to access the Production datasource that contains your projects, folders, and dgn files along with any related pdf, Word documents, Excel spreadsheets, etc.

## Logging into a ProjectWise Datasource

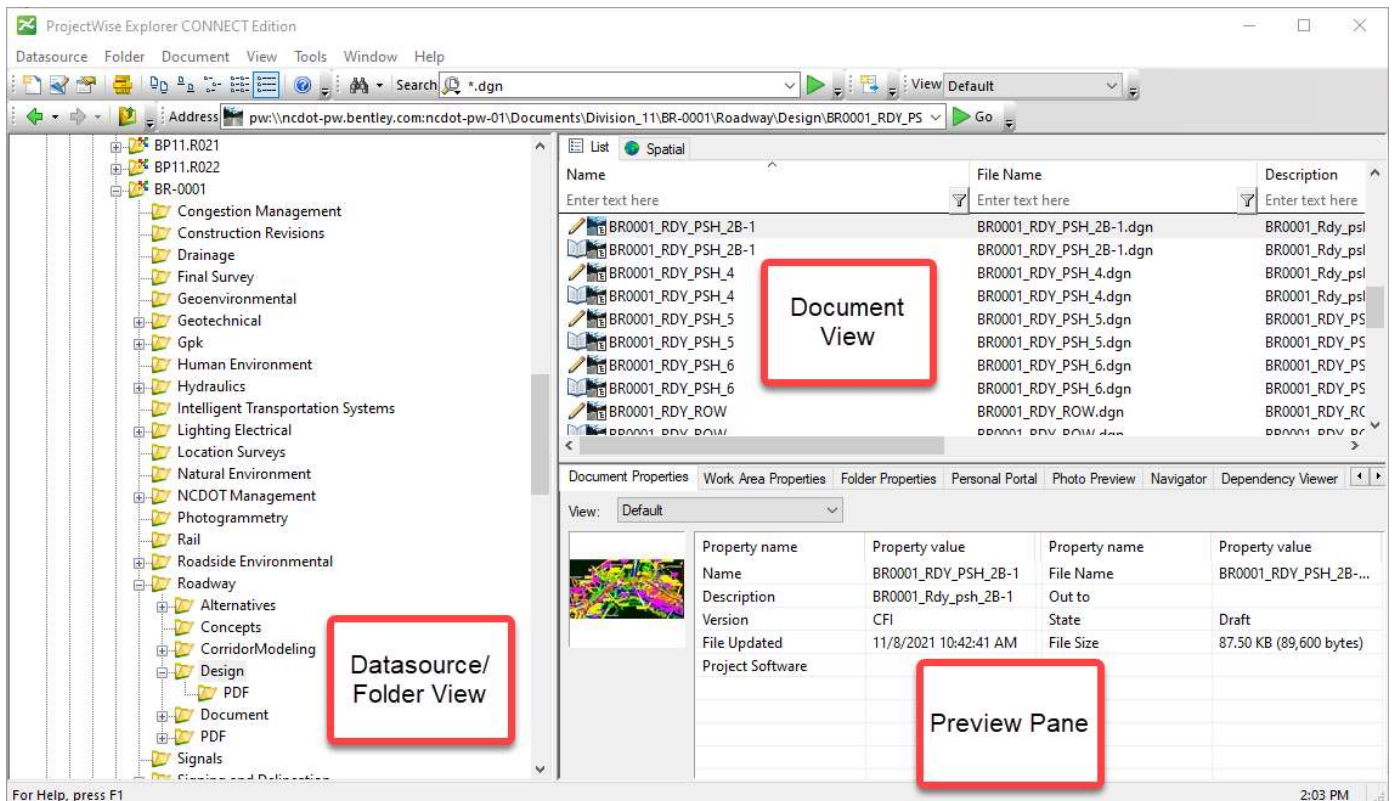
- A datasource represents a set of projects referred to as work areas in ProjectWise
- At login ProjectWise verifies your account, which determines your access rights. These rights depend on your user group assignments.
- An account will be created for you for each datasource you need to log in to.
- Your login account will be the same as the user name and password you used to create a login on the Bentley Connection Client.
- You will use Bentley IMS authentication when logging in to ProjectWise.

If you are not signed into Connection Client when you open ProjectWise Explorer, then it will open automatically to allow sign in.








## ProjectWise Datasource – Working Directory

- The first time you log into a datasource you are prompted to create a Working Directory
- This working directory is a location on your computer that contains copies of the files that you check or copy out from a ProjectWise cloud plus your workspace files.
- Applications launched from ProjectWise Explorer will use these files automatically which makes opening them go faster. You can sync your work to the server using a command called Update Server Copy

## ProjectWise Explorer Application Window



**Icons Which Indicate a Document’s Permission and Status**

	<b>Read / Write</b> — The document is checked in, and you have permission to modify the document.
	<b>Read Only</b> — You have read-only access to the document, either because you have neither Write or File Write privileges for this document, or possibly because the document is a version.
	<b>Locked</b> — Document is either checked out or has had a managed export made by another user. The document can still be opened as Read Only.
	<b>Checked Out</b> — Document is checked out to you.
	<b>Exported</b> — There has been a managed export of the file by you.
	<b>Final Status of a Document</b> — Someone has set Final Status on this document.
	<b>Final Status of a Version</b> — Someone has set Final Status on this version.

**How To Check Out A Document**

ProjectWise is a document management system that uses a “Check Out / Check In” procedure. When a document is checked out, a copy of the document is created and placed on your local hard drive into your “Working Folder”. Here are the four methods that can be used to check out a document:

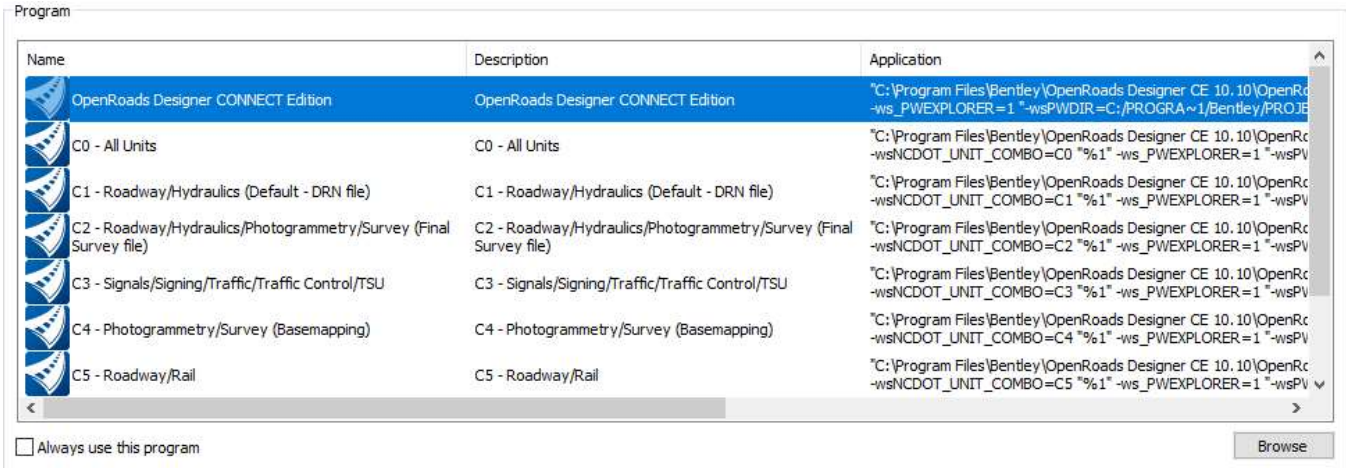
- 1) Double-click on the document. This will check out the document and open it.
- 2) Right-click on the document and select “Open”. This is the same as double-clicking the document.
- 3) Right-click on the document and select “Open With”. And navigate to the specific application to open the document.
- 4) Right-click on the document and select “Check Out”. This will check out the document but not open it. Once the document has been checked out, it becomes locked in the database. Other users can open the document in a Read Only format.

**Delta File Transfer (DFT)**

Rather than transferring entire files across a network, ProjectWise uses a process call Delta File Transfer (DFT). Only the changes in a file are transferred during check-out or check-in. Doing this significantly improves the speed and performance when transferring a file.

## Using NCDOT Managed Workspaces

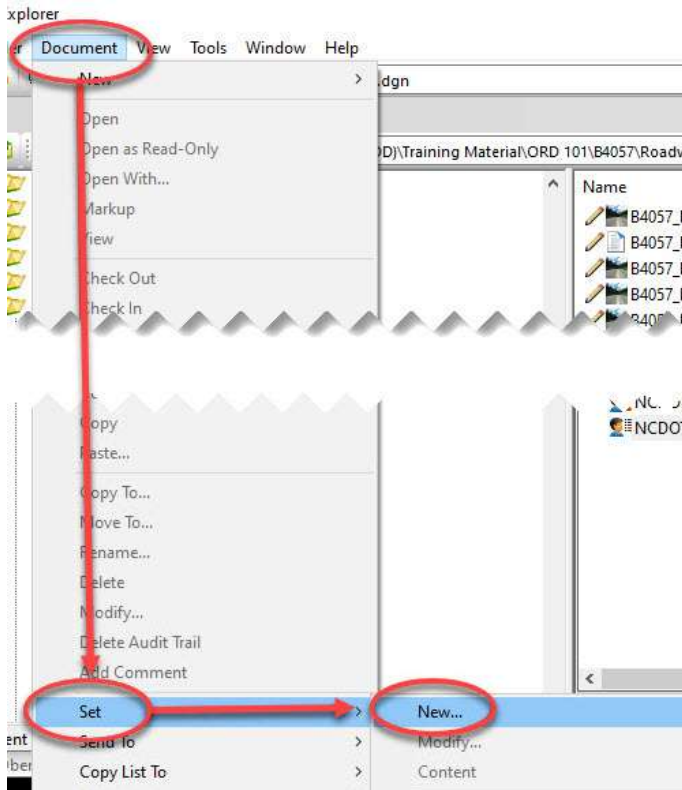
Work Areas that have been associated with a Managed Workspace will automatically download the most recent discipline standards for a file depending on which folder the file resides in. Each discipline's folder has a configuration set up that will load the related workspace. If you have need to load any of NCDOT's combo workspace, you can right click on the file and use the Open With... option from the menu. This will duplicate the functionality of the desktop icons for previous version that were delivered within the ZIP file.



## NCDOT Export to Shareport

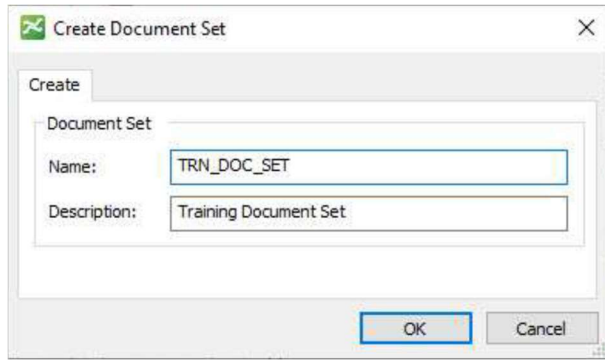
### 1) Create a Document Set

- a. From the Document main dropdown menu, choose Set > New

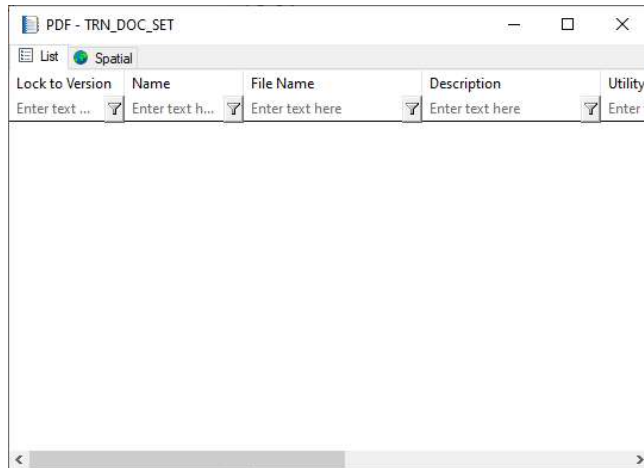


This will open the Create Document Set window.

- b. Enter the document set name and description then click OK



A blank window will display.



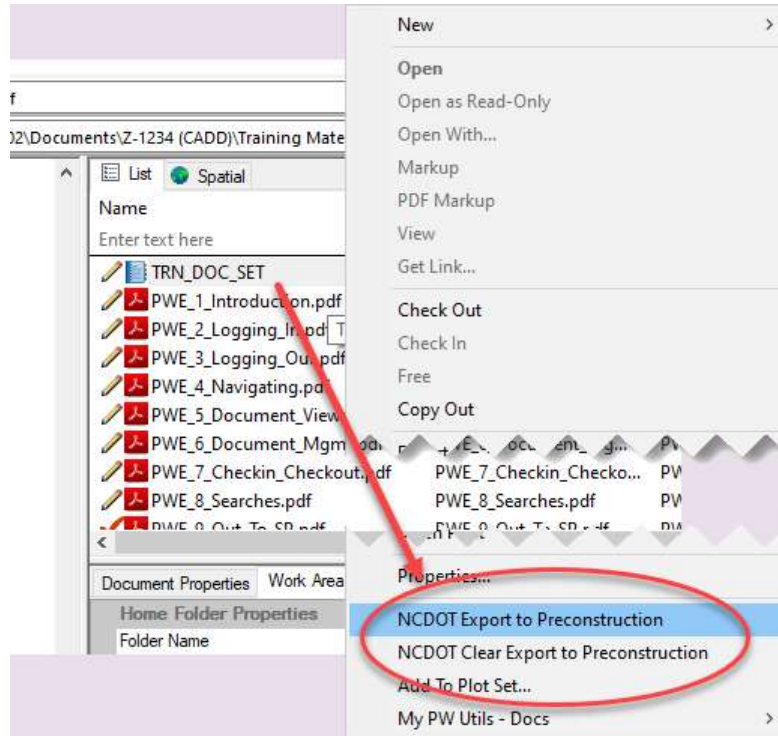
- c. Drag any files to be included to the blank window then close by clicking the "X" in the upper right corner.
- d. Adding/removing files from the document set  
At any time, documents can be added/removed by opening the document set.
- i. Open the document set by double-clicking it OR right click on the document set and select Open. A window will display all the documents in the set.
  - ii. Drag the additional documents into the window to add.
  - iii. Right-click on the file within the document set window and choose Set > Remove from Set  
A box will appear asking "Do you want to remove document(s) from the set?"
  - iv. Click Yes
  - v. Close the document set when finished.

2) Export to SharePoint

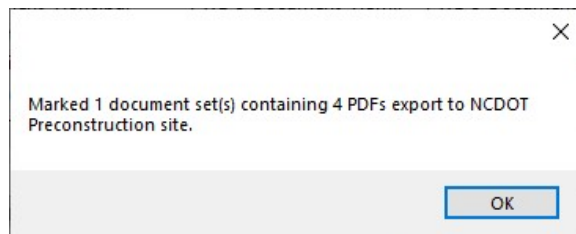
A document set may contain multiple file types, but only PDF files will be sent through this procedure. The PDF files will be place in a SharePoint location according their project and discipline.

- a. Right-click the document set

- b. Click "NCDOT Export to Preconstruction"



A box will display indicating the files will be sent



Currently the files are scheduled to be sent every hour between 6am and midnight.

- c. The flag can be reversed by right-clicking the document set and clicking "NCDOT Clear Export to Preconstruction".