

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.
- Use it to access the datasources that contain your projects, folders, and documents along with opening dgn, pdf, Word documents, Excel spreadsheets, etc.
- Your administrator will create an account for you for each datasource you use
- Your login account will be the same as the Windows user name and password you use to log in to your operating system

Logging into a ProjectWise Datasource

- A datasource represents a working area in ProjectWise
- Each datasource is associated with a separate database
- Each datasource can have one or more 'Storage Areas' – or where files are physically located
- At login ProjectWise verifies your account, which determines your access rights. These rights generally depend on your user group assignment
- There are two types of ProjectWise accounts:

Logical: Only known to ProjectWise

Windows: Synchronized with Windows (Windows accounts automatically log you into ProjectWise when you click the +)

If you are not signed in already, click CONNECTION client to sign in to Bentley with your Bentley account.

This is separate from the datasource log in, and if used should be done before you log in to a datasource. You can log in to a datasource without signing in to Bentley, however you cannot make use of CONNECTED projects until you sign in. The button does not appear if you are already signed in through the CONNECTION client.

When existing ProjectWise projects are associated with CONNECTED projects you can go to the project's Project Portal in ProjectWise Explorer and access ProjectWise Connection Services including ProjectWise Project Performance Dashboards, ProjectWise Project Sharing, and ProjectWise Deliverables Management. You can also go to your Personal Portal and take advantage of custom LEARNING paths and software recommendations based on role and skill level.

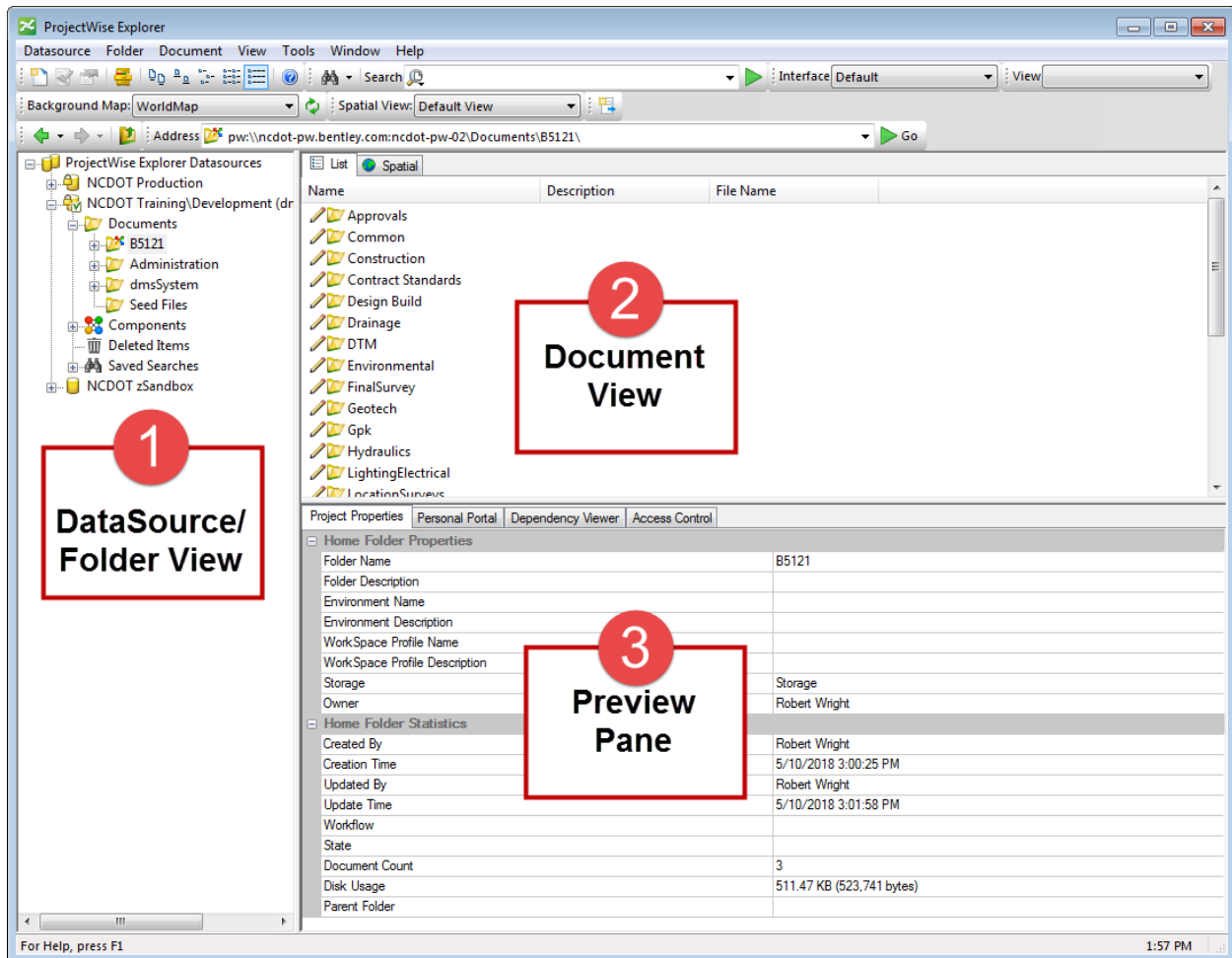
ProjectWise Datasource – Working Directory

- The first time you log into a datasource you are prompted to create a Working Directory

Your working directory is a location that contains temporary copies of the files that you check or copy out from a ProjectWise server.

- 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
- Multiple users should never share the same physical working directory. It can cause problems with check outs and exports

ProjectWise Explorer Application Window

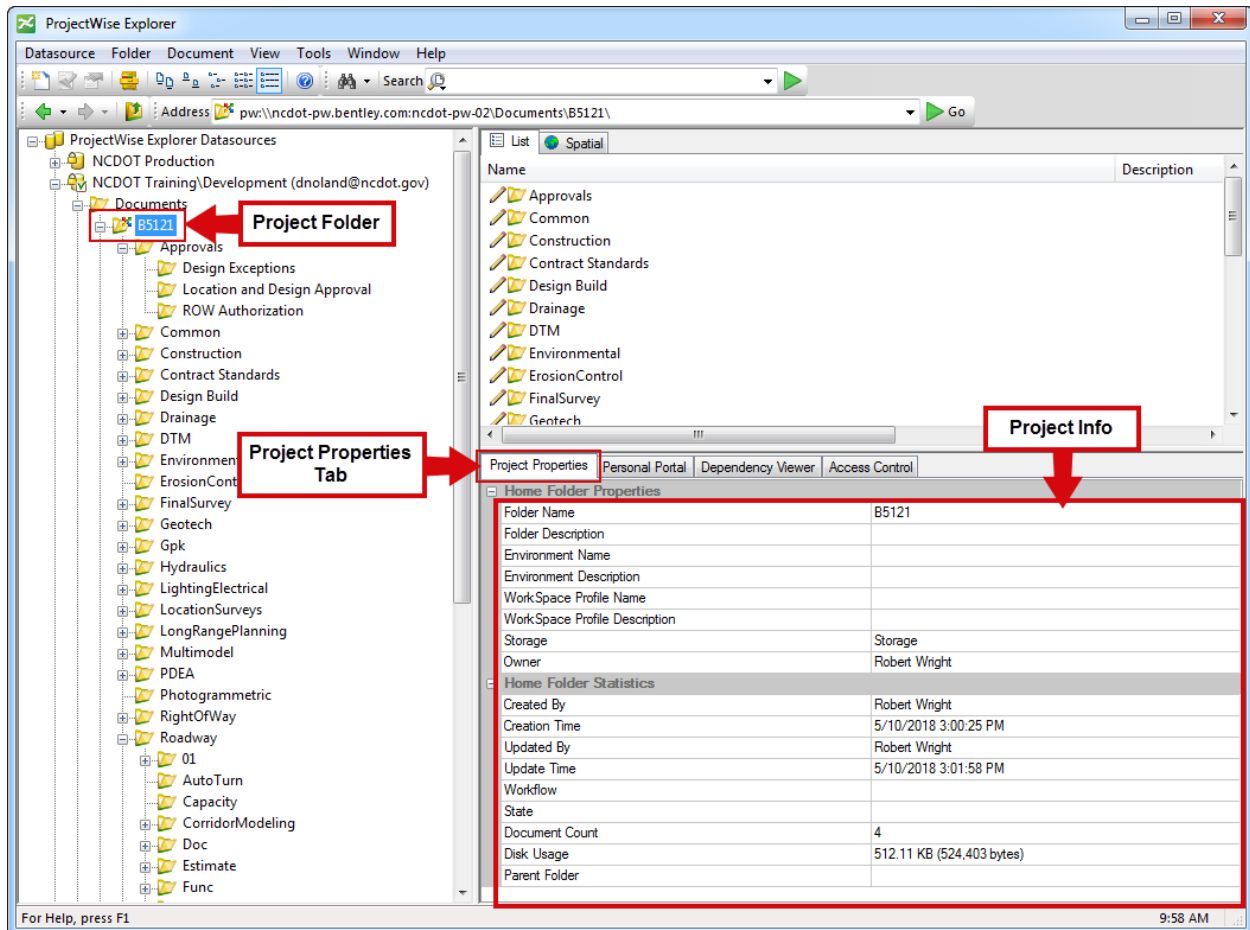


The ProjectWise Explorer Window has three main sections:

- 1 **Datasource/Folder View** – Left Pane
- 2 **The Document View** – Right Pane
- 3 **Preview Pane** – Bottom of Right Pane

Project Properties Tab:

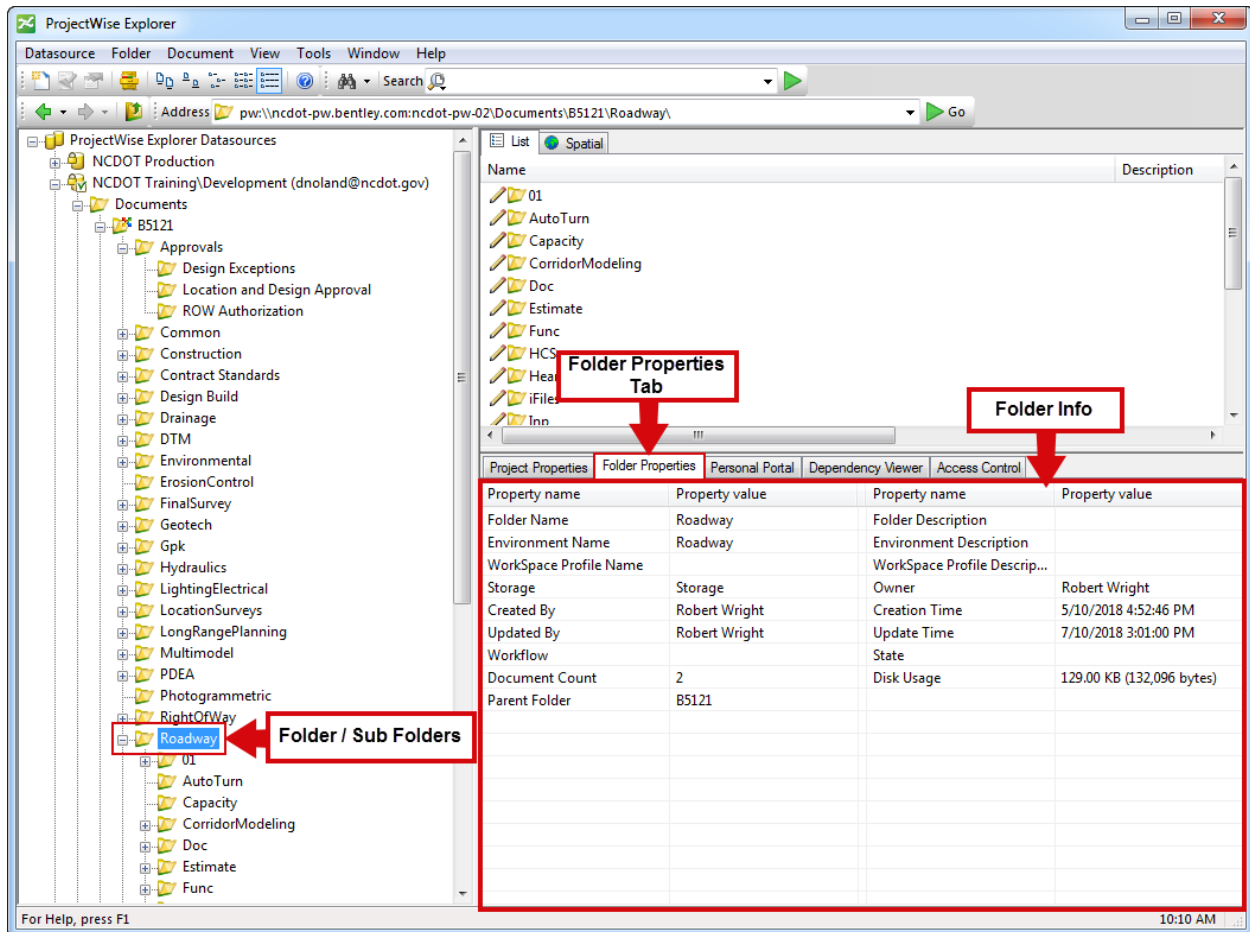
When selecting the Project Folder (such as B5121) the Preview Pane Tab will change to highlight "Project Properties". This tab will give basic project information (are not editable). See illustration below for more details:



Project Properties Tab

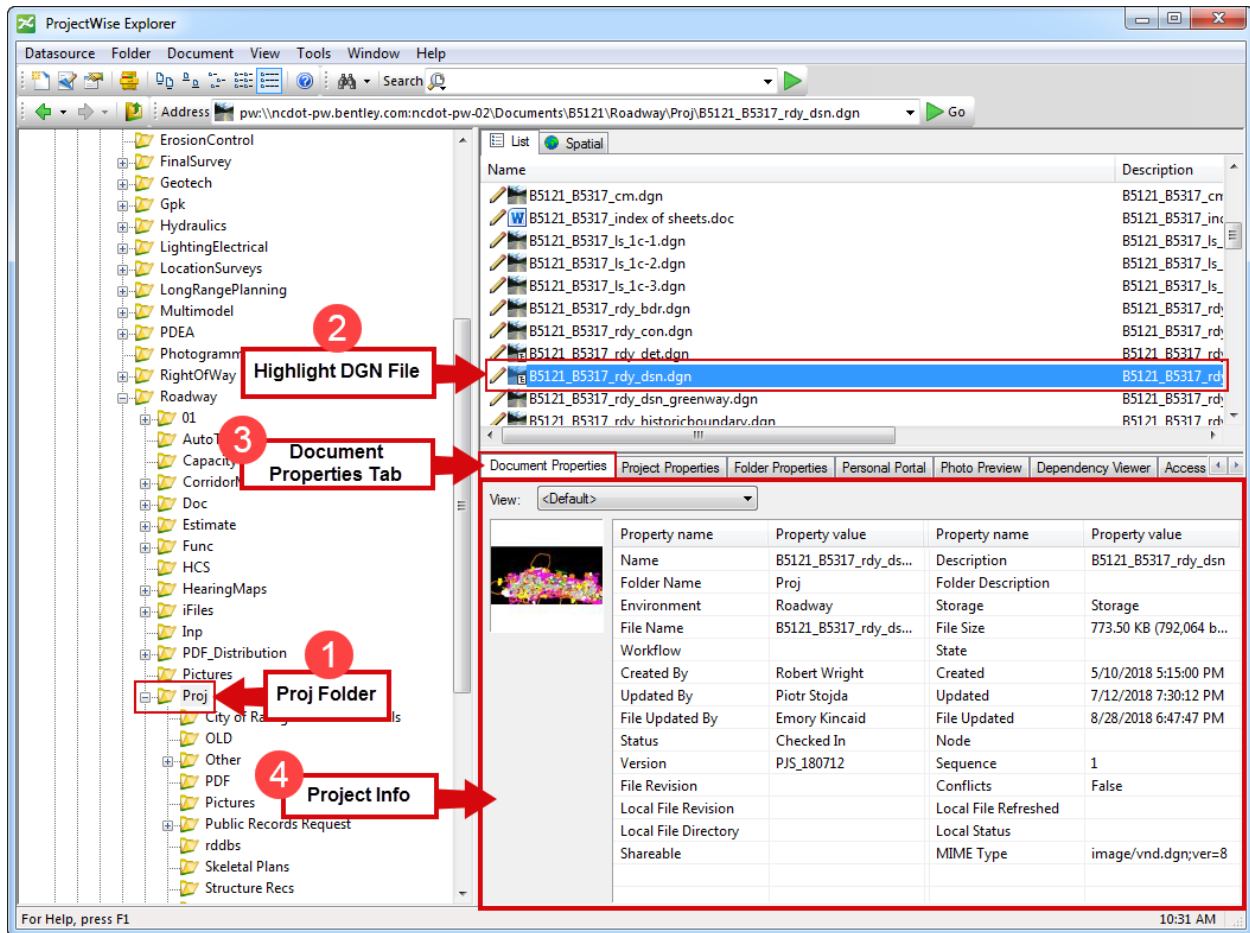
Folder Properties Tab

When selecting any folder (or sub folders) under the project (such as B5121 > Roadway) the Preview Pane Tab will change to highlight "Folder Properties". This tab will give basic information about the folder (are not editable). See illustration below for more details:



Folder Properties Tab

Document Properties Tab - (when a document is selected) shows the general document properties. This includes items such as DGN File Name, Folder Name, Environment, Checked In/Out Status, Version, Description, etc. See illustration below for more details:



Folder Properties Tab

Other Preview Pane Tabs:

Personal Portal Tab

- You can go to your Personal Portal and take advantage of custom LEARNING paths and software recommendations based on their role and skill level

The Project Portal Tab

- (When a CONNECTED project is selected) Access ProjectWise Connection Services including ProjectWise Project Performance Dashboards, ProjectWise Project Sharing, and ProjectWise Deliverables Management

Dependency Viewer Tab - shows any known dependencies of a selected document

- ProjectWise searches its database for any known dependencies of the selected document, and generates a temporary dependency map to show the document and all documents linked to it, with each document represented by a block
- Logical set (master file and its references), documents with link sets, or a flat document set (group of documents).

Photo Preview Tab - let users preview an image, such as a photograph for image files








- Does not open the document itself; a copy is downloaded to the working directory
- Users can use the arrow keys to move through the pictures
- Supports JPG, TIF, GIF, PNG, PDF, HTML, DOC, XLS and PPT documents

Document View

When you select a folder, its contents are displayed in the document list

- By default, the Document View will display file names, file descriptions, status and the document creator
- Depending on access, you may not see a folder or the documents in that folder
- The Preview Pane contains information about the selected folder or document
- Each document in ProjectWise has two icons associated with it:
 - The first indicates the document permission and status
 - The second represents the application the document is associated with

Icons Which Indicate a Document's Permission and Status and Permissions

	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 or 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.
	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.

How to Check Out / Check In 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 the user’s local hard drive into what is referred to as a “Working Folder”. Here are the four methods that can be used to check out a document:

Method #1

Double-click on the document. This will check out the document and open it.

Method #2

Right-click on the document and select “Open”. This is the same as double-clicking the document.

Method #3

Right-click on the document and select “Open With”. And navigate to the specific application to open the document.

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

Example:

- You open a file in ProjectWise (check-out).
- This copies the file from Bentley’s Cloud Server to your local hard drive
- You work on your file (on your local hard drive)
- You finish your work and close/exit (check-in)
- Using Delta File Transfer, ProjectWise only updates the “changes” made to the original file stored on Bentley’s Cloud Server