# PROJECTWISE EXPLORER SS4 QUICK GUIDE

Launch into ProjectWise at:
- Windows 7: Start > Programs > Bentley > ProjectWise V8i (SELECTseries4) > ProjectWise Explorer
- Windows XP: Start > Programs > ProjectWise V8i (SELECTseries4) > ProjectWise Explorer

Log-In:
1. From the datasource menu, select **Log In**
2. In the ProjectWise Explorer Log In box, ensure **MDOTProjectWise** is in the datasource field.
3. Enter your username and password
4. Hit **Log In**
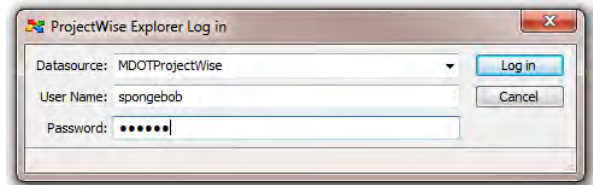
The first time your password is accepted a pop-up message asking you to create a **c:\pwise** directory, click **Yes**
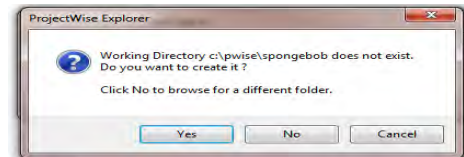
Select Interface:
It is a requirement that every ProjectWise user adds intelligent documents into the system. Therefore, each business area has an individual customized interface, allowing users to add the appropriate data for their business needs.
1. From the **View** menu, select **Toolbars**
2. Check **Interface**
A new item called "interface" will appear on the toolbar, use the down arrow to select the interface that best matches your business area.
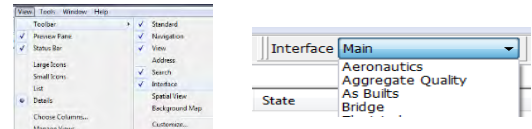
Advanced Document Wizard Defaults:
On project related documents, it is always recommended that you use the ProjectWise Advanced Document Wizard to assign project related attributes to your documents, making them searchable and valuable to future business needs. You can control how much help you get from the wizard by changing the default properties.
1. From the **Tools** menu, select **Wizard Manager**
2. In the Wizard Manager dialog, click the **Advanced Wizard** icon
3. Click the **Properties** button
4. In the Advanced Document Creation Wizard Prosperities window, check the following as shown in the Advanced Document Creation Wizard Properties graphic
5. Click **OK**
6. Click **Close**
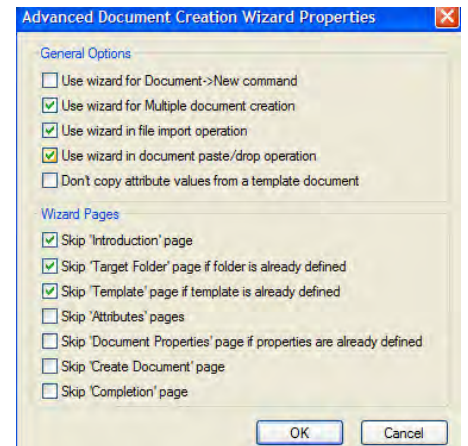
Icons:
ProjectWise uses standard Windows program associations to visually display file type and permissions. User rights are displayed with a smaller icon to the left of the application.

Pencil	Write permissions. User can deposit new documents into the folder as well as modify existing documents within that folder.
Open Book	Read Only Permissions.

| Pad Lock	Document is locked by another user. The document can be opened as read-only, but (until the lock is removed) modifications to the document cannot be made by anyone other than the user who locked the document.
Red Check Mark	The document is currently checked out by you for modification.
Floppy Disk	The document is currently exported out to and locked to another user f and locked against modifications until the user imports the document back in.

Adding Documents:

The Advanced Document Creation Wizard walks you through the process of creating documents. You can use the wizard to create a single document or to create multiple documents simultaneously. The wizard can be especially useful when you need to create multiple documents simultaneously use the same general criteria.

1. In ProjectWise, highlight the folder you are going to deposit the documents in.

2. In Windows Explorer, navigate to where your document is stored
   In Windows Explorer, single left click and hold on the document
3. In Windows Explorer, single left click and hold on the document
4. While holding the click, drag your document into the white area in the right hand side of the ProjectWise
5. Release the click.

6. A "Select a Wizard" window appears, select **Advanced Wizard**.
7. Click **OK**
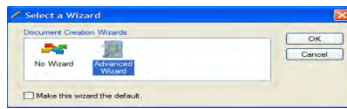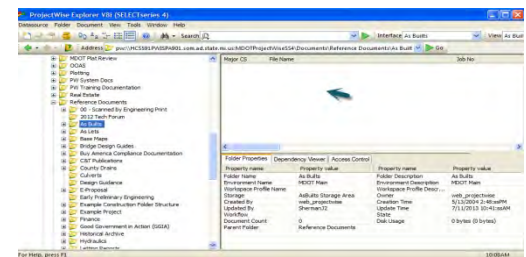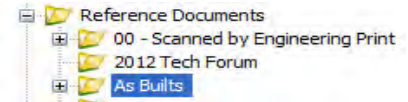
8. On **the Define Document Attributes** screen, enter the following information for each request. By adding the Job Number (without phase letters) and using the tab key, most of the fields will auto-populate from MPINS/MFOS for you. The remaining fields will require manual entry. ProjectWise has a powerful search tool, but is only as good as the information added here in the attributes information.

9. Once the attributes are entered, click **Next**.

10. On the **Document Properties** window you can add a document description and select an associated application type. Click **Next**.
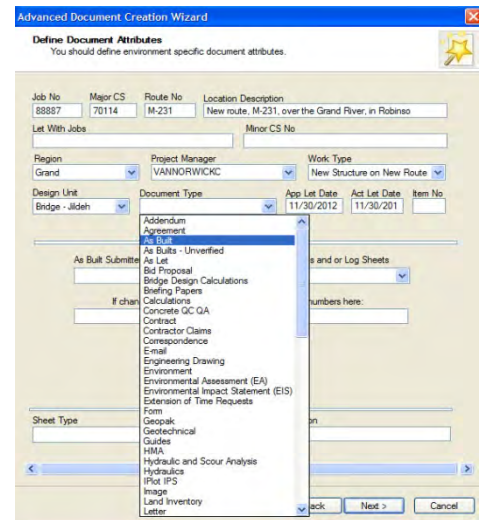
11. If you are depositing multiple documents with the same project attributes, on the **Create a Document** window, you can select the option to **Apply selected options to succeeding documents**. This allows you to apply the attributes to all documents you are depositing instead of having to add them separately for each document. Click **Next**.

12. Click **Finish**.
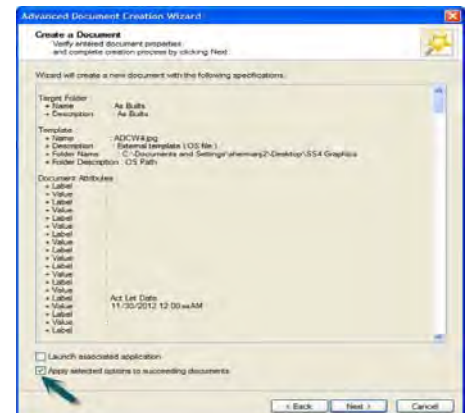
View Documents:
If you only need to view the file, no changes are being made, right click the file and select **Open as Read Only**.


Open as Read-Only

Edit Documents: Checkout/Checkin
The ProjectWise interface is very similar to Windows Explorer. By default, any file in ProjectWise (with a pencil icon next to it) that is double clicked on will automatically be checked out and opened in the associated application.
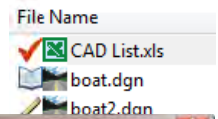
Once changes have been completed, you will want to check it back into the system.
1. **Save** and **Close** the file
2. In the Check In window, select the **Comments** tab
3. Enter any comments for the audit trail you may have
4. Click **Check In**
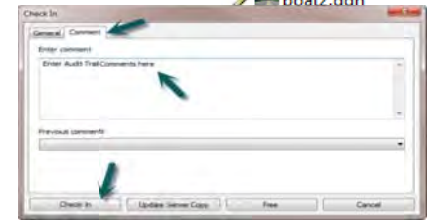
Import Document:
Import should be used if you need to replace a document with an updated version. By doing an import the existing Job Number and other information assigned to the existing document will not have to be re-entered.
1. In ProjectWise navigate to the document you want to replace
2. Right click on the document and select **Properties**
3. Go to the **General** tab
4. In the "File" section, click **Advanced** pull-down
5. Select **Import**
6. Click **Yes** to the ProjectWise Explorer message pop-up
7. **Browse** to where the file is stored
8. Highlight desired file, click **Open**
9. Click **Save**
10. Click **Close**
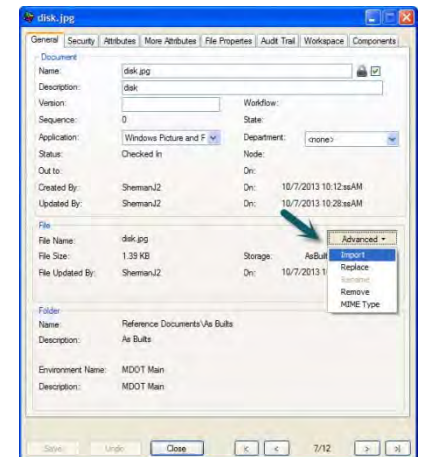
Exporting Files:
Exporting basically means copying documents out of ProjectWise for external use. There are two options when exporting documents: Export and Export to a Folder. The selection depends on your use of the exported documents. You can also export an entire folder out of ProjectWise.

Send To a Folder – use this to copy documents to a specific location on your computer when no modifications are necessary. **(recommended)**
1. Right click on a document or folder and select **Export**
2. In the Document Export Wizard, select **Send To Folder**
3. Click **Next**
4. Click Browse in order to navigate to the desired location where the document is to be exported
5. Click **Next**
6. Click **Finish**

Free Documents:
Warning – Freeing a Document can be dangerous! Free is one of many manipulation options available in ProjectWise. This operation deletes the checked out document from your ProjectWise working directory **without** updating the server version. Use this operation when you have wrecked your active document and you Do Not want to update the server copy.
1. Highlight and right click the document to be freed
2. Select **Free**
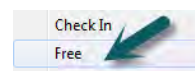
**Adding attributes to existing document(s):**
For files already existing in ProjectWise there is a simple way to place attribute values on existing documents.

1. Right click on a document wish to add attributes to
2. Select **Properties**
3. Select **Attributes** tab and enter attributes
4. Click **Save**
5. Click **Close**
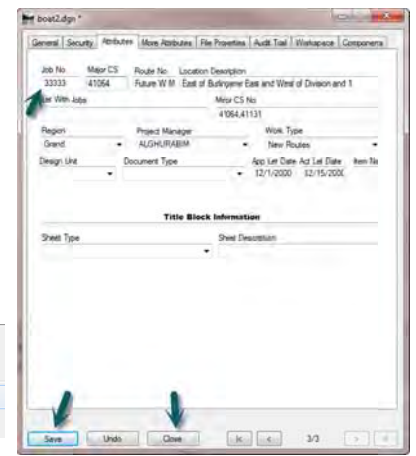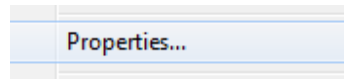
To copy add attributes to more than one document at a time
1. Right click on a file with the attributes you wish to copy
2. Select **Attributes / Copy Attributes**
3. Highlight the target documents (unlimited) and right click on the target group
4. Select **Attributes / Paste Attributes**
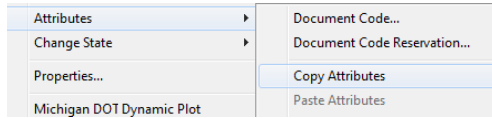
Adding a ProjectWise link to an Outlook email:
1. In **Outlook** open the desired email to send link
2. In the **Format Text** tab, ensure the **HTML** option is selected
3. In ProjectWise highlight the file you would like to create a link to
4. Click inside the address bar to highlight the entire link address
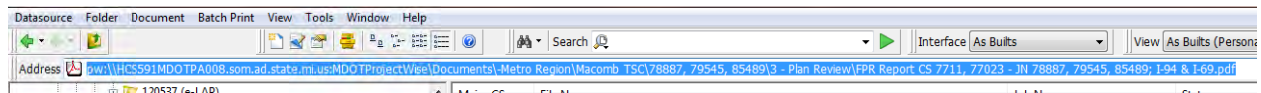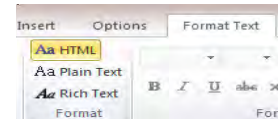
5. From your keyboard click **CTRL+C** to copy the link
6. In the email perform **CTRL+V** to paste the link

Searching for Documents in ProjectWise:
ProjectWise stores documents in a Windows based project folder structure. ProjectWise has a powerful search engine to locate documents by attributes such as Job Number, Control Section, file type, and document type. ProjectWise relies on the document attribute information to perform thorough searches. Your search can be as broad or as specific as you want. Just be aware of the constraints that are set. ProjectWise will look for documents the EXACT way you tell it to. If you are not getting the desired results please review your attribute selections.

Search Form
To start a search
1. Highlight folder to search within
2. Right click
3. Select **Advanced Search**.
4. *OR* Click on the **Advanced Search** icon in the toolbars
5. The **Search by Form Definition** Dialog box will appear.
6. Select the **Search Form**, click **OK**.
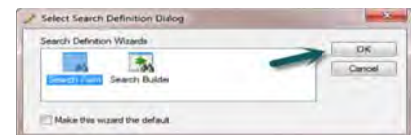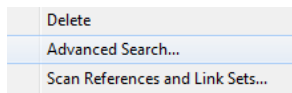
General Tab
From the General Tab you can search by document attributes such as Name, Description and Status.

Attributes Tab
The Attributes tab of the Search by Form is used to locate documents by specific information. Key in what is known about a Job Number to perform a general search for all documents that are under a specific Major CS, Region, Project Manager, Route, etc.
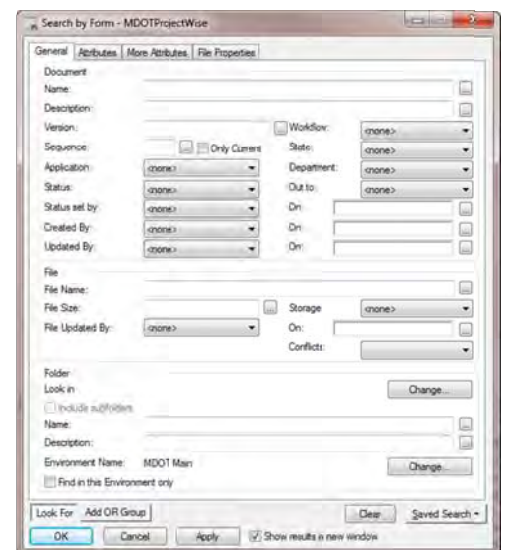
Saving Searches:

ProjectWise users may find that they will often use the same type of search criteria for a project in their work area. Searches are basically filters you set to show only the information (documents) you are interested in. These searches must be named and saved for repeated use in ProjectWise.

For example, to search a folder to find all As Builts in CS 39022 do the following:

1. Right click on the As Built folder and select **Advanced Search**.
2. In the Search by Form dialog click on the **Attributes** tab
3. In the Major CS field, enter **39022**
4. Select **Saved Searches** > **Save As** >**Personal** folder
5. Check the **Save Search Name** box
6. Enter the name of your search
7. Click **Save**
8. Back on the **Search by Form** window, check **Show Results in Separate Window**
9. Click **OK**
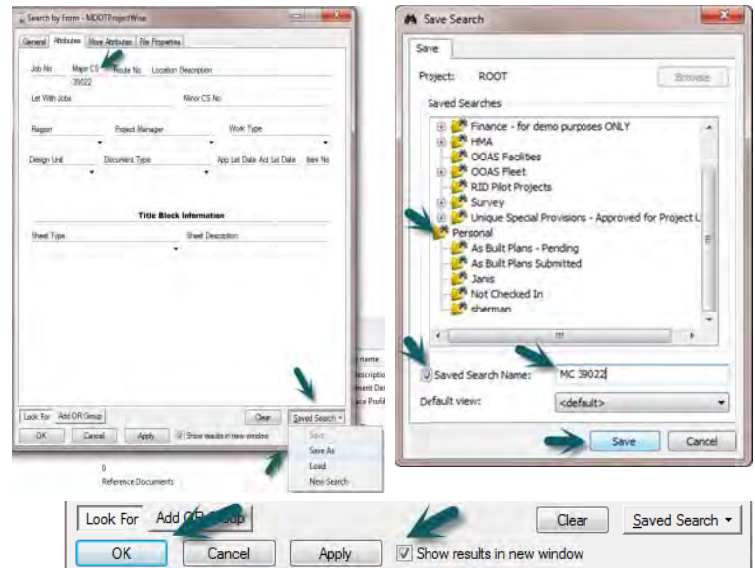
Modify Search:

1. Right click on your Saved Search and select Show In Search Form
2. Modify the search criteria
3. Select Saved Search in the lower right and Select Save

Name Synchronization:

In ProjectWise the "FILE" refers to the actual electronic document, such as the word, excel, pdf, microstation, jpeg, etc. And the "DOCUMENT" refers to the metadata attached to that file such as the created by, created date, updated by, files size, attributes, audit trail comments etc. Therefore in every ProjectWise training classes we always tell the users to always make sure the "Name" and "File Name" fields are an exact match. That way when you search for documents, it doesn't matter if you search the name or file name field.

The new Name Synchronization feature defaults a lock to force the names to match. The only way new documents being entered into the system will not match if is the user manually unlocks the option.

iPad / Safari Support:

iPad users can now connect to ProjectWise Web Parts using their Safari browser.

ProjectWise Support:

For answers to all your ProjectWise needs please contact the following resources:

- For general ProjectWise issues contact: MDOT-ProjectWise@michigan.gov
- For issues regarding letting proposals, plan, RID, NTB and addenda contact: MDOT-Eproposal@michigan.gov
- For ProjectWise construction related issues contact: MDOT-ProjectWiseConst@michigan.gov