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Chapter 1

1.1 Introduction

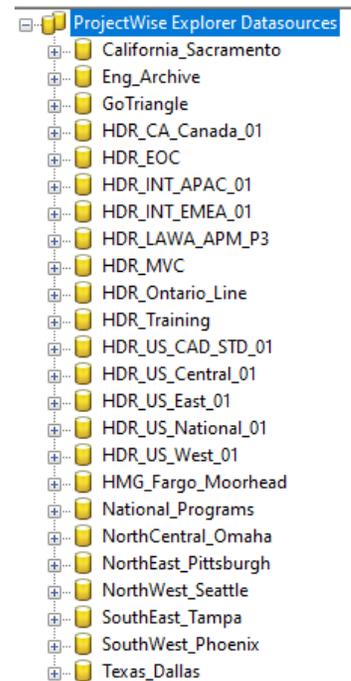
ProjectWise is HDR’s chosen document management and collaboration tool. It was chosen for its capability to manage documents in a secure environment that expedites data sharing among project team members both internal and external to HDR.

This manual is designed to show you the basics of using ProjectWise in your work environment based on best practices designed by the Quality Office and ProjectWise Support Team.

1.2 Getting Started with ProjectWise

To start ProjectWise from the **Start** menu, select “Programs | Bentley | ProjectWise Explorer”

Provided your workstation has been properly configured for HDR’s ProjectWise environment, after starting ProjectWise, you will see several HDR Datasources and a HDR National Datasource. *(For some users, additional datasources may be available for use depending on teaming efforts with another organization’s ProjectWise system.)*



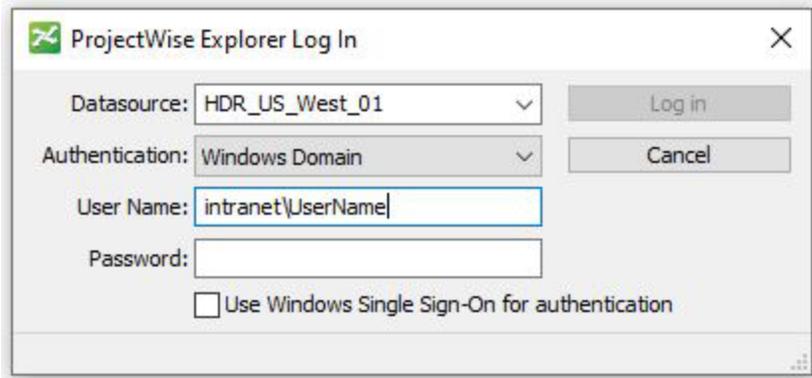
Tip: You can create an additional shortcut by right-clicking on the ProjectWise Explorer shortcut and selecting “Pin to Start menu” or drag it to the Desktop.

1.3 Datasource Login

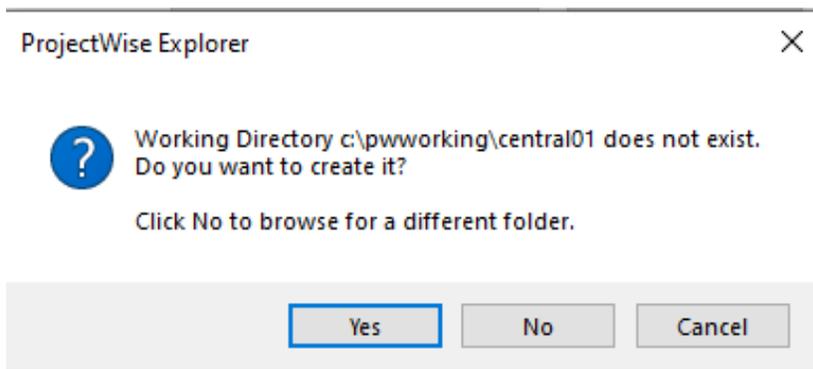
Use either a link provided by the project team or the initial instructions provided by HDR’s ProjectWise Administrator in order to determine the proper HDR Datasource.

As long as the Bentley Connection Client is properly configured, access to datasource should be automatic, if not you may get this dialog box.

The ProjectWise Explorer Log in dialog will appear as shown below. Enter the provided “User Name” and provided “Password”. HDR staff would use Windows Domain Authentication, non-HDR staff will use ProjectWise Authentication.



If this is the first time logging into a particular datasource, a dialog similar to the one shown below may appear. Select "Yes" to create the folder.



Chapter 2

2.1 The ProjectWise Interface

Notice that the ProjectWise interface is made up of components very similar to that of Windows Explorer and Microsoft Outlook.

- Folder Structure Tree (Left)
- Content Window (Upper Right)
- Preview Pane (Lower Right)

The information in each of the panes is a display of the information being stored in the ProjectWise database (mentioned in the Introduction of this training manual). We will discuss the database in detail once we begin creating and modifying folders and documents.

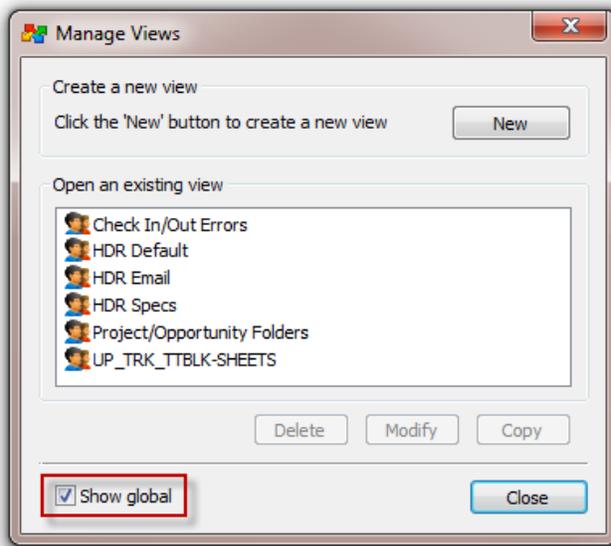
All panes and toolbars are movable and dockable to allow you more real estate on your screen where you need it. There are several ways to customize the interface. This includes re-arranging file attribute

columns, create custom views, and to add/remove columns as desired. By default, all users have the HDR Default view available which displays many of the common document attributes.

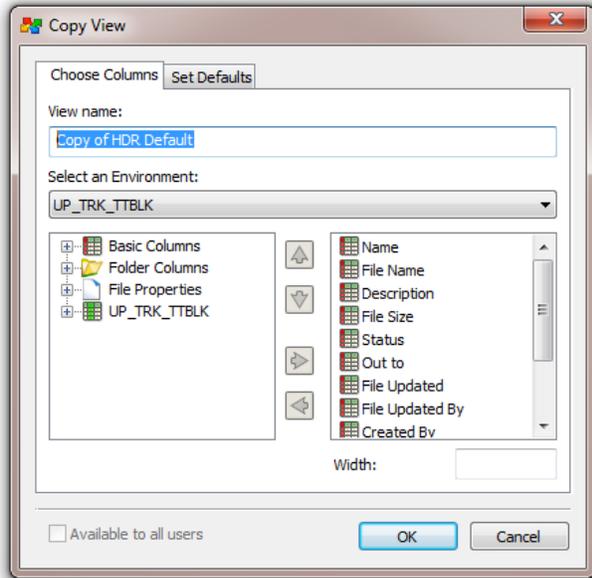
2.2 Customizing Your View

It's possible to create as many Views as you like. Begin by selecting the "View" pull down menu from ProjectWise. Next, select "Manage Views" as shown below.

After selecting "Manage Views", the following dialog will appear. From this point you may create a new view or copy an existing one and modify as necessary. To copy the existing HDR Default view, check the box in the bottom right corner of the Manage Views dialog box. This will make the HDR Default view visible. Next, select HDR Default and click the Copy button.



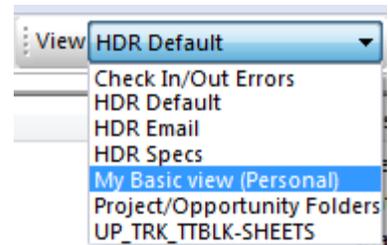
Upon clicking copy, the dialog box below will appear. In the "View name" field, type the desired view name.



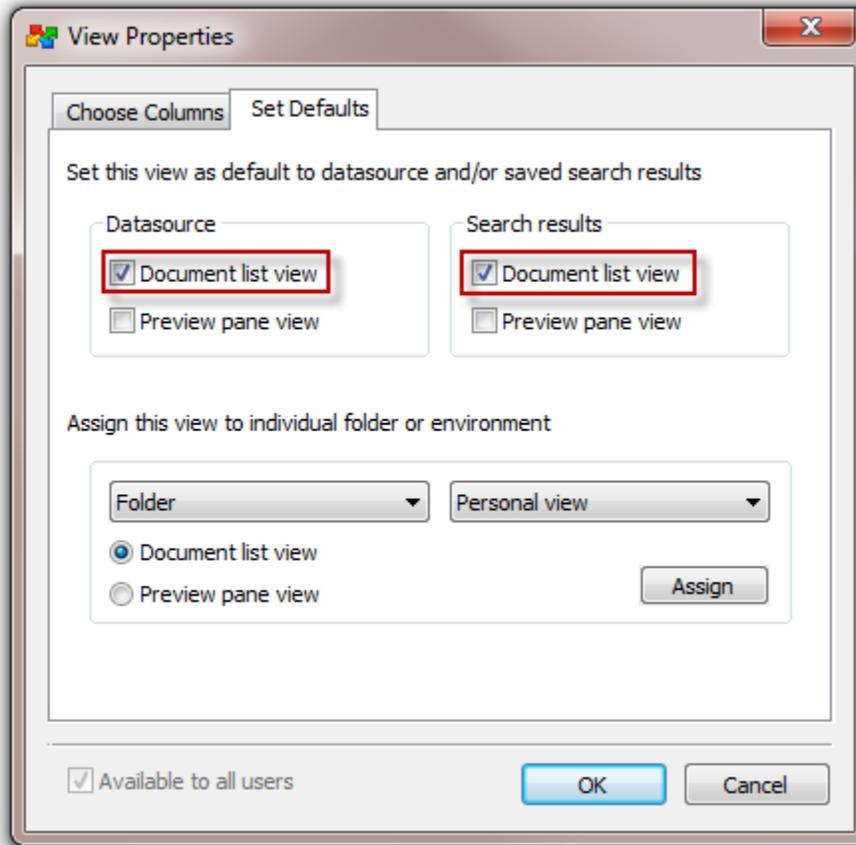
If the HDR Default view is not desired as a template, simply click the “New” button. A similar dialog box will appear to name your view and modify as desired.

Expand “Basic Columns”, choose your columns. Once columns are chosen, you may re-order them from the window in the right-hand side of the dialog. Finally, click the “OK” button.

Views can be switched as desired. Again, views can be created for various purposes to help with workflows and tasks. Saved views are listed in the “View” drop-down list in ProjectWise. If not displayed, click View | Toolbar and add a checkmark next to the Views dialog to enable it.

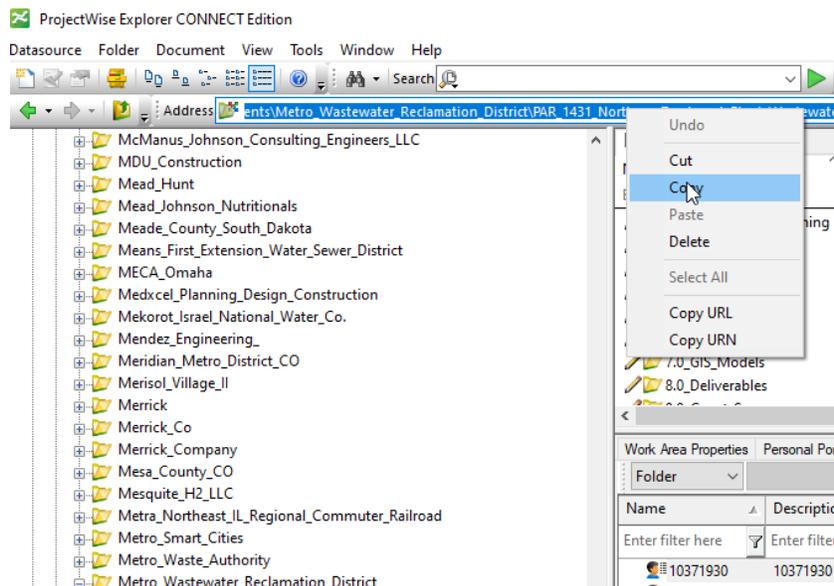


Views are set on a per folder basis. If you wish to use a specific view as your default view for each folder you click into, go to the “Choose Columns” dialog under the “View” pull down menu and select the “Set Defaults” tab. Check both “Document List Views” boxes as shown below.

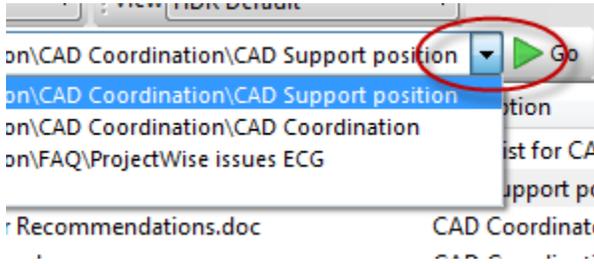


2.3 Address Bar

The address bar shows the active location whether it be a folder or document. The contents of the address bar can be copied and pasted into a document or email to direct someone else to a location of a folder or document.



Another useful feature of the address bar is folder/document history. The last 7 folders/documents will be displayed for a period of 7 days. Click the down arrow on the right of the address bar, and then choose the desired previously accessed document.



Chapter 3

3.1 File Context Menu

As with Windows Explorer, the right-click action on documents will display a context menu of different tasks that can be performed. The image below briefly outlines the many available options.

| | |
|---|--|
| <ul style="list-style-type: none"> New ▶ Open Open as Read-Only Open With... Markup View | <p>New – Use to create a new document or multiple documents.</p> <p>Open – Checks out document for editing. (same as double-click)</p> <p>Open as Read-Only – Use for viewing or printing.</p> <p>Open With – use if you need to direct ProjectWise to open with a specific application.</p> <p>Markup – use a markup application such as Bentley Navigator</p> <p>View – view over 200 non-CAD file types with ProjectWise viewer.</p> |
| <ul style="list-style-type: none"> Check Out Check In Free Copy Out | <p>Check Out – Use to download and lock a document for editing.</p> <p>Check In – Returns file from your workstation to the server.</p> <p>Free – Releases checked-out files. Warning: Edits will be permanently removed! (Think of it as an “undo” or “disregard changes” command.)</p> <p>Copy Out –Downloads a copy to your working directory; allows others to check out and edit. This command is used to place a local copies into the cache.</p> |
| <ul style="list-style-type: none"> Export... Import Export Dependency Map(s)... Import Dependency Map(s)... | <p>Export – Checks the file out to a user-specified folder on your PC or on the network. Use any time you need to work on a file away from the HDR network. Use Export rather than working in the DMS folders.</p> <p>Import – Imports the Exported file.</p> |
| <ul style="list-style-type: none"> Update Server Copy Refresh Local Copy Purge Local Copy Purge Workspace | <p>Update Server Copy – Updates copy in ProjectWise. Use to push revisions to the server for others but keep a file checked out to continue working on it.</p> <p>Refresh Local Copy – Overwrites local copy with server version.</p> <p>Purge Local Copy – Removes locally cached file(s) from working directory.</p> <p>Purge Workspace – Removes the local cache of the Managed Workspace.</p> |
| <ul style="list-style-type: none"> Cut Copy Paste... | <p>Cut – remove the document</p> <p>Copy – Copy the document</p> <p>Paste... – Paste previously copied or cut document.</p> |
| <ul style="list-style-type: none"> Copy To... Move To... Rename... Delete Modify... Add Comment | <p>Copy To – Copy within ProjectWise. You can also drag and drop or drag with a right-click and select “Copy Here”.</p> <p>Move To – Move within ProjectWise. You can also drag with a right-click and select “Move Here”.</p> <p>Rename – Dialog opens for filename, name, and description. It is best practice to keep Name and File Name identical as appropriate.</p> <p>Delete – The audit trail will show when a file was deleted and by whom.</p> <p>Modify – Used to change the value of a selected attribute simultaneously in several documents and in several folders and subfolders. Documents can be selected either from the Document window or as a result of a search.</p> <p>Add Comment – Provides the ability to add a comment to the file audit trail.</p> |
| <ul style="list-style-type: none"> Set ▶ Send To ▶ Copy List To ▶ Attributes ▶ Change State ▶ Properties... | <p>Set – Shows reference information.</p> <p>Send To – Send to a printer or to an e-mail recipient.</p> <p>Copy List To – Copies a list of files to the clipboard.</p> <p>Attributes – Used to copy and paste environment attributes between files.</p> <p>Change State – Use for workflow and to put a file into a state such as Final Status. Final Status will show a “tag” indicating file is locked to changes. To remove a final tag, call the Help Desk.</p> |

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| | Properties – Allows you to see all the file properties, including the audit trail. Another way to get to the file properties is to highlight the file name in ProjectWise and then press the space bar. |
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3.2 File Status Icons



Tip: Clicking on the plus (+) next to the folder name is a much faster method of drilling down through folders. Double clicking will work but the database will have to refresh each time.

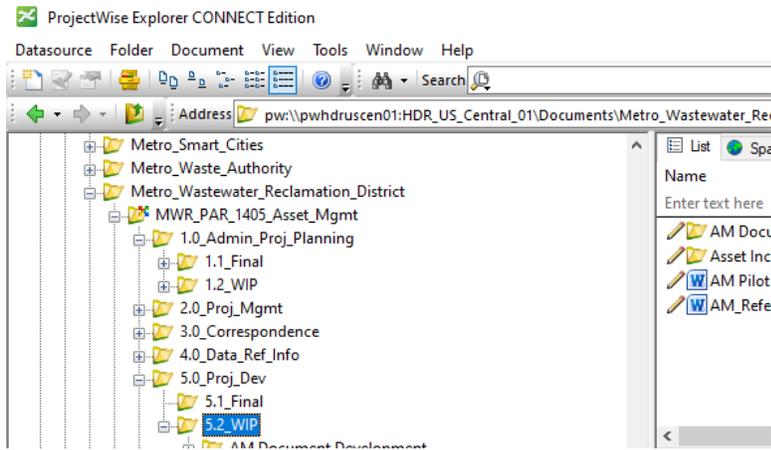
| Icon | Name | Description |
|------|----------------|---|
| | Pencil | Read/Write access. |
| | Open Book | Read-Only access (either because access control is set to read-only or because the document is an older version). |
| | Lock | Document is currently checked out or has been exported by another user. |
| | Red Check Mark | Document is checked out by you. |
| | Exported | Document has been exported by you. |
| | Final | Document is locked in Final Status. |

3.3 Working with Folders and Documents

Projects in ProjectWise are created on one of the datasources. Projects are organized by Client Number and Project Number. In some cases the Contract Number is also used. This project data is parsed directly from EBS based on the project data for the office that booked the project. In other words, interoffice workshare agreement numbers are not used in ProjectWise.

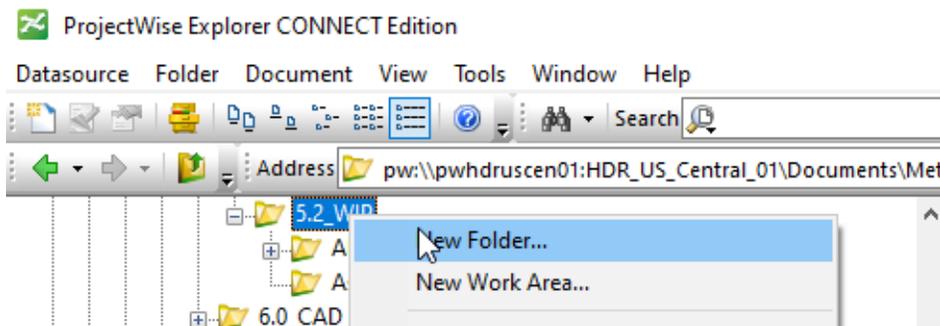
3.4 Navigating to a Project Folder

After logging into the datasource where your project was created, expand the Documents folder and locate the client that HDR is contracted with on the project. Expand the client folder and you will see a listing for all of the client's projects you have access to.



3.5 Creating a New Folder

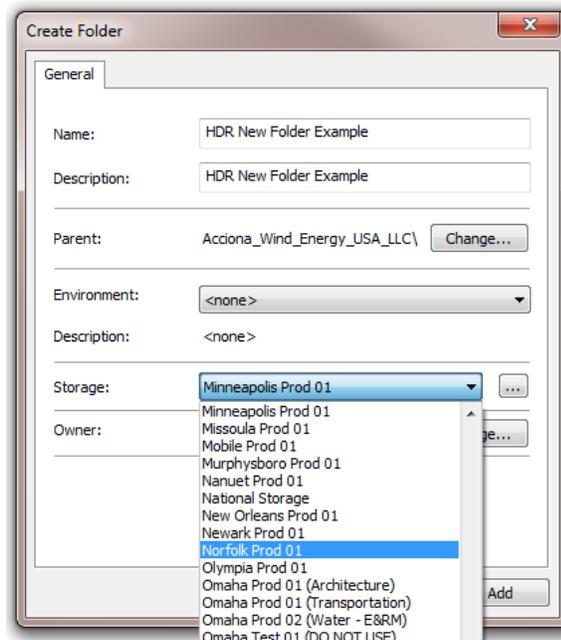
To create a new folder, right-click on the parent folder and select “New Folder”



When the dialog box appears, enter the Name and Description you wish to use. In most cases, the folder name and description should remain the same to avoid confusion. Next, select the pull down box labeled “Storage”. You will see a list of HDR offices. Simply select where you wish for the folder to be located and click on “Add” or “OK”. Any file added to that folder will be stored on that offices server. This is commonly referred to as the “Storage Area”.

3.6 Creating a New Document

There are multiple ways to create new documents in ProjectWise. The fastest way is to drag and drop the file from Windows Explorer or Outlook. For Microsoft Office documents, documents can be saved through the integrated “Save Document As” dialog box. Or a new document can be created through the ProjectWise Document pull down menu with a file imported into it. The two most common methods are explained in further detail below.



Tip: Always be aware of the Storage Area, especially on worksharing projects. Common perceptions of slowness are due to files not being stored on the most appropriate Storage Area.

Drag and Drop

To drag and drop from Windows Explorer or Outlook, click on the folder in ProjectWise you wish to create the file in. Locate the file in Windows Explorer or Outlook then drag the file into the content pane in ProjectWise. **After verifying the document was created properly, you will need to delete the original file.**

Office Integration

To create the document for a Microsoft Office application, begin a new file in the desired application. From the File pull down menu, select "Save". After a short delay, a ProjectWise Log In dialog box will appear. Select the correct datasource and enter your login information. Once the "Save Document As" dialog box appears, enter the name, description and file name you wish to use.

3.7 Move/Copy Documents and Folders

Copy Documents

Documents can be copied from one folder to another by the drag and drop method (operates just like Windows Explorer) or the right-click > Copy method. This manual will describe in further detail, the right-click > Copy method. Locate the document you wish to copy, right-click on it and select "Copy".

1. If you would like to make a copy of the document within the same folder, you simply need to modify the Document Name, Description and File Name fields and select "OK".
2. If you would like to make a copy of the document to a different location, click the "Select" button in the Document Destination area and browse to the desired location then repeat the previous step.

Copy/Paste is not available as it is in Windows Explorer for this function. Also, the Copy method is preferred versus "Save As".

Move Documents

Tip: before creating, moving or copying a document, note the Storage Area origin and destination locations. This won't necessarily improve performance but it will give you a better idea of why some project documents open slowly because of the remote location, and why other files open more quickly.

Documents can be moved from one folder to another by the drag and drop method (operates just like Windows Explorer) or the right-click > Move method. This manual will describe in further detail, the right-click > Move method.

Locate the document you wish to move, right-click on it and select “Move”. Click the Select button in the Document Destination area and browse to the desired location. Next, modify the Document Name, Description and File Name fields and select “OK”. Cut/Paste is not available as it is in Windows Explorer for this function.

Copy Folders

Folders can be copied from one folder to another by the drag and drop method (operates just like Windows Explorer) or the right-click > Copy/Paste method. The folder contents will be moved to the Storage Area of the destination folder.



Note: By default, dragging and dropping will copy documents and folders. Be sure to hold down the shift key while dropping or use the right-click drag and drop method. This will give you two options... “Copy Here” and “Move Here”.

Move Folders

Folders can be moved from one folder to another only by the drag and drop method (operates just like Windows Explorer) Moving folders in ProjectWise does not physically move the folder contents from one Storage Area to another. The folder contents will remain in Storage Area of the source folder.

3.8 Checking Out and Opening a Document

ProjectWise is a Document Management System (DMS) that works on a Check Out / Check In basis. Checking out a document physically copies the file associated with that document from the Storage to an identical location on your hard drive into what is referred to as a “working folder” or “dms folder”. *Remember that dialog that you clicked “OK” on the first time you logged into ProjectWise? That is where the working folders are located.* ProjectWise treats the working folders as a file cache similar to Internet Explorer. If the file in your dms folder is up-to-date, ProjectWise won’t have to copy a new file to you, which helps speed performance.

Check Out and Open Methods

1. Double-click on the document. *(This will check out the document and open it.)*
2. Right-click on the document and select “Open”. *(Same as double-click.)*
3. Right-click on the document and select “Open With”. Additionally, you may select the “Browse” button to navigate to a specific application. *(This will check out the document and open it with your desired application.)*
4. Right-click on the document and select “Check Out”. *(This will check out the document but not open it.)*

While you have a document checked out, it gets locked in the database. Other users can open the document in a Read Only format but you will be the only one able to update the copy on the Storage. This

greatly improves version control by eliminating the ability for multiple users to edit the same document simultaneously.

3.9 Closing and Checking in a Document

When you are ready to Check In your document, be sure you have saved your changes then exit the application as you normally do. You can click the X in the upper right corner of the application or select “Close” or “Exit” from the application’s file pull down menu.

If the application is integrated with ProjectWise, a Check In dialog box will appear... just select the “Check In” button. If the application you are working in is not integrated with ProjectWise and/or the Check In dialog box does not automatically open, you may also right-click on the document and select “Check In”. If you “Free” file from this dialog, all changes will be discarded and file (including any references associated) will be removed from you’re working directory.

Finally, you can open the Local Document Organizer and select the document(s) you wish to check in. *The Local Document Organizer is explained in section 3.12 of this manual.*

3.10 Sending Folder/Document Links to Other Team Members

In ProjectWise, we take a different approach to sending documents to other team members. ProjectWise give us the ability to send links to documents instead of sending the document as an attachment in an email. This not only reduces network traffic and the use of disk space due to the duplication of data, it helps with version control as well.

Send a link to a Single Document

1. Right-click on the file and select “Send To > Send To Mail Recipient As Link”.
2. Address the email to the recipient(s) and click “Send”.

Send a Link to Multiple Documents

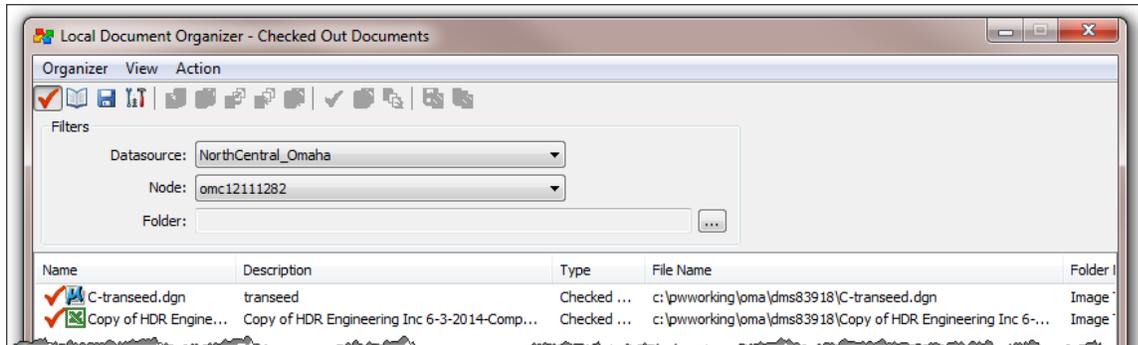
1. Compose a new Outlook email message.
2. Click on the first document you wish to include a link for.
3. Click into the address bar and highlight the entire path.
4. Go back to the new Outlook email message, right-click in the message body and select “Paste”.
5. Repeat steps 1-4 for each document you wish to include a link for.

Send a Link to Folders

1. Compose a new Outlook email message.
2. Click on the folder you wish to include a link for.
3. Click into the address bar and highlight the entire path.
4. Go back to the new Outlook email message, right-click in the message body and select “Paste”.
5. Repeat steps 1-4 for each folder you wish to include a link for.

3.11 Local Document Organizer

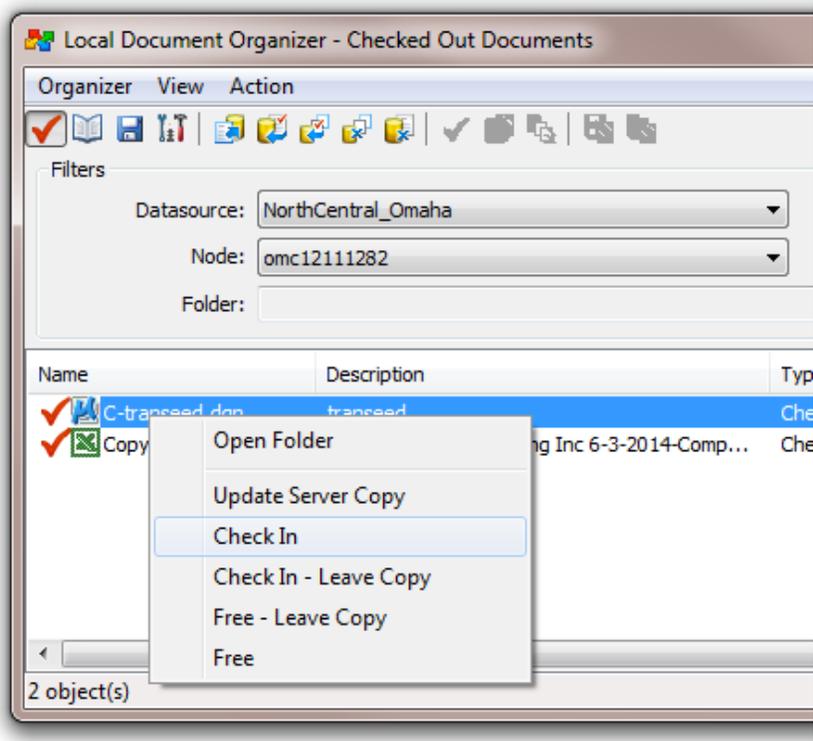
The Local Document Organizer dialog box is used to list and manage the documents that you currently have checked out, copied out, or exported.



The Local Document Organizer dialog box always opens with the View set to display Checked Out Documents. The actions you can perform from the Local Document Organizer dialog box depend on the View option that is active. You can select multiple documents in the Local Document Organizer's list box and apply a command to all of them simultaneously.

To check in a document from the Local Document Organizer, first be sure the document is closed. Then, select the document(s) you wish to check in, right-click and choose "Check In". These steps can also be repeated for updating the server copy and freeing the document.

Warning: Selecting the "Free – Leave Copy" or "Free" option will remove the file from your local cache and the action is irreversible. If you select "Free", be sure your intention is to permanently discard all changes. The document in ProjectWise server cache will not be deleted.



Selecting "Open Folder" is similar to a shortcut and it will take you to the folder in ProjectWise in which the document resides.

The Local Document Organizer opens when you choose Local Document Organizer from the Tools menu. It also opens automatically when you log out of a datasource if there are still documents checked out, copied out, or exported and the Show Organizer on log out user setting is on.

Chapter 4

4.1 Obtaining Support

Contact the HDR IS Support Center. The Support Center is staffed from 6:00 AM Central Time to 7:00 PM Central Time, Monday through Friday and available at:

Phone: 800-776-8007

Email: [HDR ITG Help Desk](#)

ProjectWise Software and Installation

The ProjectWise Explorer software, the installation guide and all other required components can be found on HDR's ProjectWise website <http://projectwise.hdrinc.com/new-user-setup.aspx>.