

CREATING ENGINEERING FILES IN PROJECTWISE

ABOUT THIS TRAINING

This training is intended to give a user the ability to create MicroStation files within ProjectWise. The student should first have a basic knowledge of ProjectWise through the **ProjectWise V8i Training 101** course.

Creating Files in ProjectWise

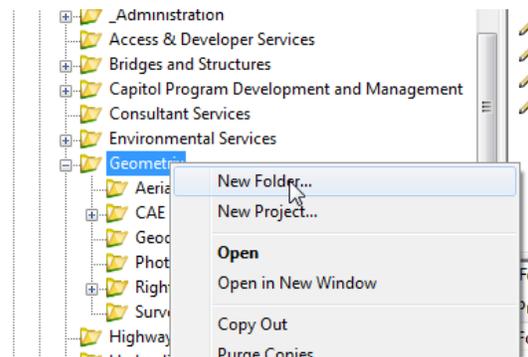
When working with file types in ProjectWise, it might help to consider them in one of two groups. The first group would be for simple, non-linked files. Most Microsoft Office files fall into this group. The second group would be for compound documents. Typically most InRoads and MicroStation files would fit in this group.

There are exceptions to each group. Some Microsoft documents such as Excel, are linked to other documents and so they would fall into the compound document group. Some InRoads/MicroStation files have no links or references so they could fall into the simple document group.

It's important to understand the distinction between simple files and compound files because ProjectWise maintains the links in compound files, so they require certain procedures when created. Let's start by looking at the procedure to create a folder and bringing in a simple file into ProjectWise.

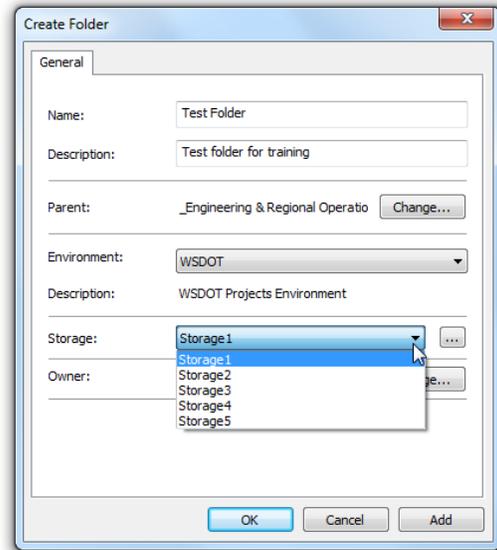
Creating a New Folder

If a new folder is required for your file, be sure to create that first. In ProjectWise Explorer select the parent folder then right click and select **New Folder...**



The **Create Folder** window opens. Fill in the name and description in the first tab.

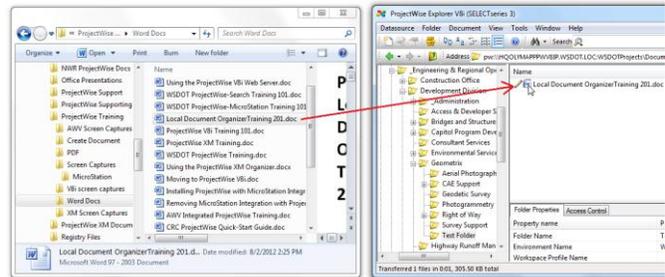
In some cases you may need to change the storage area. Please check with your office ProjectWise admin or contact the CAE Helpdesk.



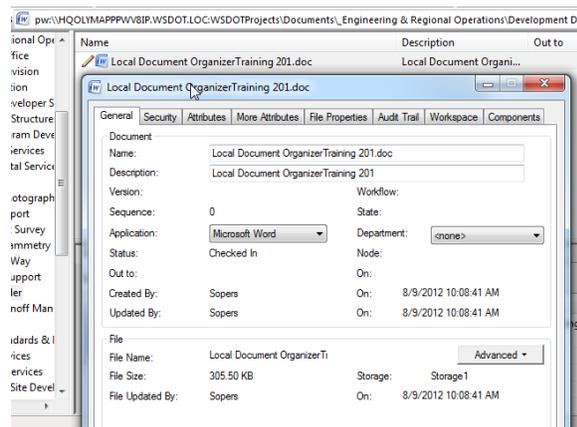
Creating a Simple File for ProjectWise

Let's say that you need to create a new Word document. Since it won't have links or references, this file should be created outside of the ProjectWise environment and then imported.

- Create the file and place it on your desktop or a local folder.
- Open ProjectWise Explorer and Windows Explorer (or show the Desktop)
- Drag and drop the file into the ProjectWise folder.



The file is now placed in ProjectWise and the properties can be viewed. You can revise file information if needed.



Any file, including MicroStation files, can be imported into ProjectWise using this method, just remember that it will have no links to other files.

Document Name versus File Name

You may have noticed in the previous screen capture there is a **Name:** under the **Document** section and a **File Name:** under the **File** section. The file that was brought into ProjectWise was created with the same information for both sections.

ProjectWise is a file management system working from a database. When a file is brought into ProjectWise, a column is created in the database to track the file – this is the document. That means that every “object” in ProjectWise has both a document name and a file name. By default, when you bring a file into ProjectWise, it uses the name of the file to populate the document name and the description. Though it isn’t critical, you should strive to keep these names synchronized.

It is possible to have a document (the database entry) in ProjectWise without a file attached to it. This is done for items that cannot be stored on the server, such as a physical thing like a hard copy file or a piece of machinery. In this case you would create a document and describe the item’s physical location in the attribute tab or within the audit trail.

Creating MicroStation/InRoads Files within the ProjectWise Environment

To create a file that originates in ProjectWise, you have to use an integrated application. Most offices do not integrate Microsoft Office products with ProjectWise so if you need to create a linked Excel file, please contact your ProjectWise Administrator. You might think you can use the **Document > New > Document...** pull-down menu to create a file in ProjectWise but all this does is create a “document”. As explained before, this document is simply a place holder in the database that still requires a file to be imported. This is just a long way to import a simple file into ProjectWise.

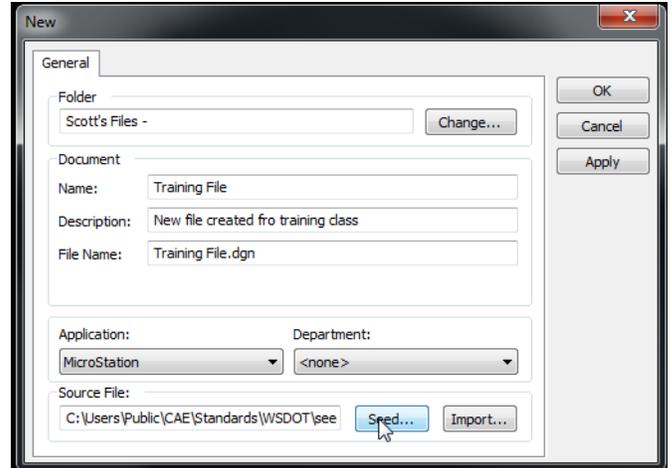
To create a MicroStation or InRoads file in ProjectWise, open any MicroStation file from ProjectWise. It won’t matter what file or folder so it’s best to choose a small one.

Once the file is open, select **File > New**.

By default this window populates with information from the file that was originally opened.

Begin by changing the **Folder** information (if needed).
Change the **Name**, **Description** and **File Name** keeping the Name and File name the same.

Change the **Source File** (seed file) if needed.

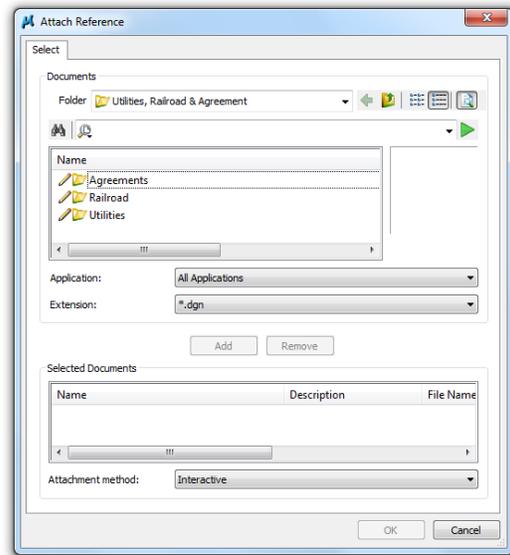


Referencing Files in ProjectWise

Files are referenced in ProjectWise using the same procedures as before. You begin by selecting **File > Reference**, then **Tools > Attach**. At this point a slightly different window opens, pointing to files within ProjectWise.

Choose a file and click on **Add**. Repeat until all the desired files are selected.

Select **OK** and continue through the process.



More on ProjectWise File Linking

One of the strengths of ProjectWise is its ability to maintain file linkages even when files are moved from folder to folder. There are cases where existing MicroStation files are brought into ProjectWise and those links must be re-established. For example, an outside consultant brings a group of files that need to be imported into ProjectWise and there are known links between them. In these cases ProjectWise has the ability to scan the files for reference links and re-establishes them. This process is typically handled by the project administrator.