

Project Collaboration

Using Project Data Outside of ProjectWise

Note: This chapter refers to working with documents outside of ProjectWise. The methods described in this chapter also apply to working with folders with a few exceptions.

Exporting and Importing Documents

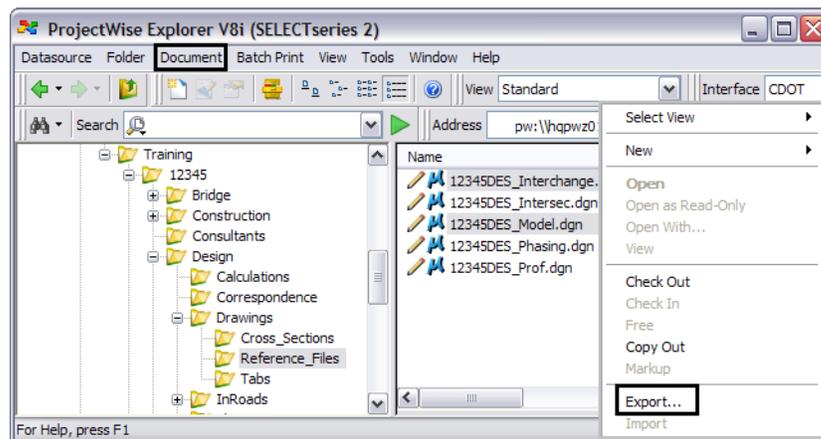
Exporting and importing documents are tools within ProjectWise that would be used to:

- ◆ Update project documents on a mobile computer while traveling
- ◆ Share files with CDOT groups don't have access to ProjectWise
- ◆ Share files with organizations such as consultants or other state agencies that don't have access to CDOT's ProjectWise environment

Exporting Documents

To export a document:

1. Select the documents to be exported from the ProjectWise Explorer window then click on **Export...** from the Document menu. You can also right click on the document and select **Export...** from the list. This will start the *Document Export Wizard*.

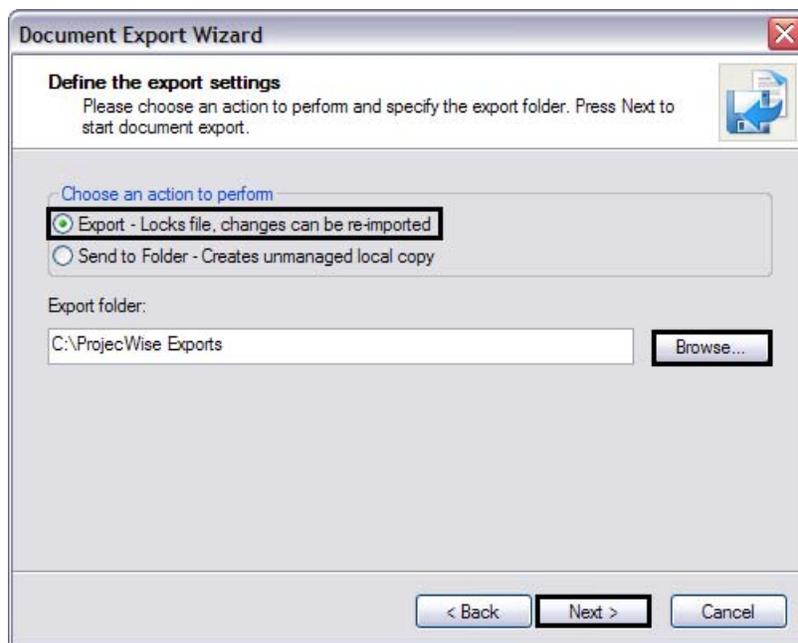


Note: Files that are currently checked out cannot be exported.

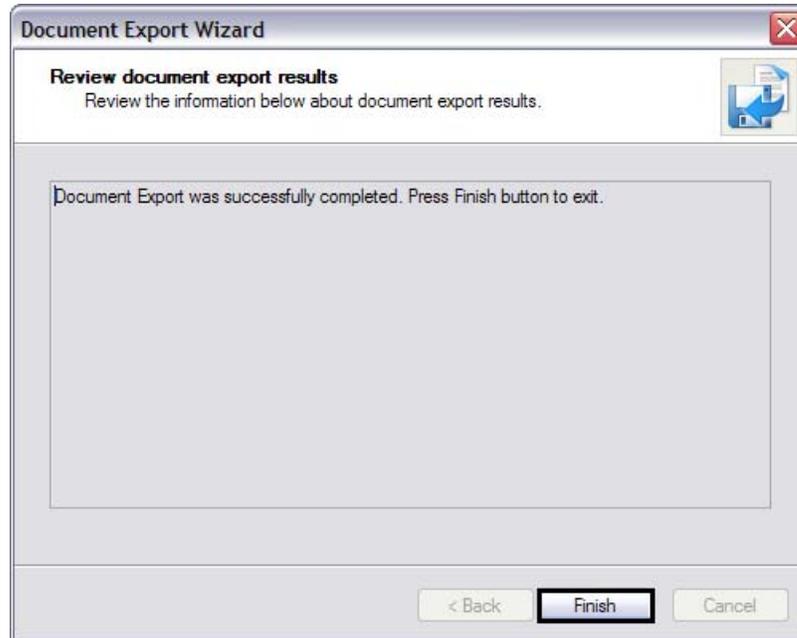
2. Click on the **Next** button.



3. In the section **Choose an action to perform** select the **Export** option. This will lock the files so that no changes can be made to the file while you have them exported.
4. Click on the **Browse** button to select the destination folder and then click **OK**. You may create a new folder for the export by using the **Make New Folder** button.
5. Click on the **Next** button.



6. A status window is displayed showing the progress of each file being exported. The process is complete when the Review document export results screen appear
7. Click on the **Finish** button.



Once the export is complete the status icon for the documents will change to  and the *Status* of the document is changed to **Exported**.

Note: If the exported document is a MicroStation drawing that has references, the references will also be copied to the export folder. However, the *Status* of the reference file **will not be changed to Exported** and the reference file will be available for Check Out by other users.

In the example below, the files 12345DES_Model.dgn and 12345DES_Interchange.dgn were exported using the Document Export Wizard. Since the file 12345_Model.dgn also had a reference file attached, the reference file (12345HYDR_Model) was also copied out to the export folder.

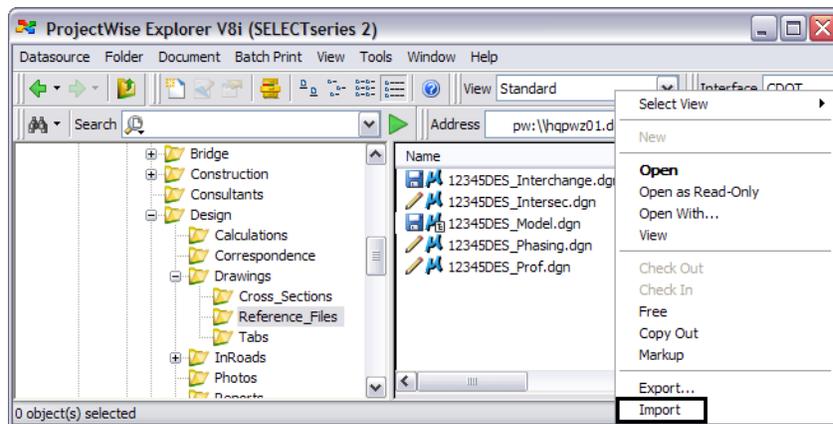


Importing documents

The import tool is used to import documents that are exported. In order to import a document it must be in the same folder it was exported to or ProjectWise will not know where to find the file.

To import a document:

1. Select the documents to be imported from the ProjectWise Explorer window then click on **Import...** from the Document menu. You can also right click on a document and select **Import...** from the list.
2. The **Check In Document** dialog box will appear. Enter a comment reflecting the changes that have been made and click **OK**.



3. The status icon for the documents will change to  and the **Status** of the document is changed to **Checked In**.
4. An alternate method of importing a document is to use the **Local Document Organizer** as described in the chapter [Working with Documents in ProjectWise](#).

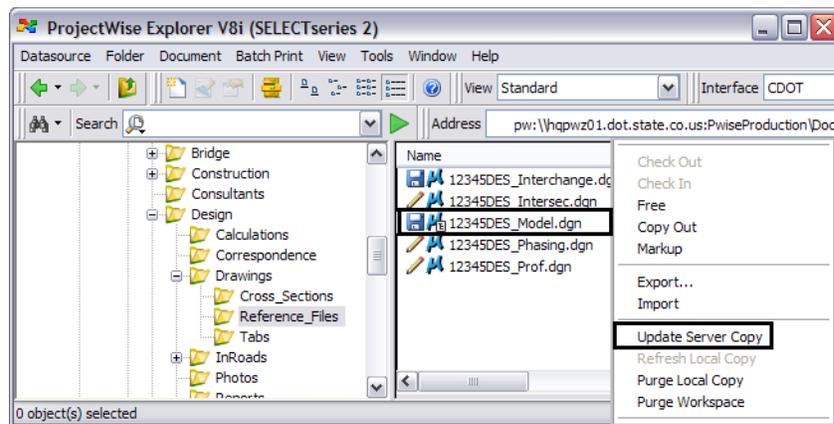
Updating Exported Documents in ProjectWise

If a document is going to remain exported for an extended period of time, it is good practice to periodically update the copy stored on the ProjectWise server. Updating the server copy of a file serves two purposes: First, team members and stakeholders will be able to see the latest changes made to the exported document and be assured they are looking at the most current data possible. Second, changes made to the exported document will be backed up on the ProjectWise server.

To update the server copy of an exported document:

1. Select the documents to be updated from the ProjectWise Explorer window then click on **Update Server Copy** from the Document menu. You can also right click on a document and select **Update Server Copy** from the list.

- The **Update Server Copy** dialog box will appear. Enter a comment reflecting the changes that have been made and click **OK**.



Sharing Project Data with Consultants

Using the Export feature of ProjectWise provides an easy way to share files with a consultant that doesn't have access to ProjectWise. Use the following steps as a guide to sharing project files with a consultant.

- Create the files in ProjectWise that the consultant will be responsible for modifying including any standard reference file attachments.
- Export the files to a local or network drive following the steps above.
- Send the files to the consultant using a suitable method that accommodates the size of the files being delivered. I.e. e-mail, cd, flash drive, etc.
- When the consultant returns the updated files, overwrite the file in the location they were originally exported to.
- Use the Local Document Organizer to import the files back into ProjectWise or to just update the server copy.

Using Microsoft Outlook with ProjectWise

Although Outlook can be integrated with ProjectWise similar to MicroStation and InRoads, CDOT has chosen not to do so at this time. Even without being integrated, there are several areas of project activity where Outlook and ProjectWise interact with each other including:

- ◆ Storing project related e-mail received in Outlook to the project folder in ProjectWise
- ◆ Sending document links to other team members that have access to ProjectWise
- ◆ Sending a copy of a document to someone with no access to ProjectWise

Storing Outlook E-mail in ProjectWise

You can store Outlook e-mail and/or attachments in ProjectWise by using the standard drag and drop method. The video [ProjectWise and Outlook](#) will show you how to store Outlook file in ProjectWise.

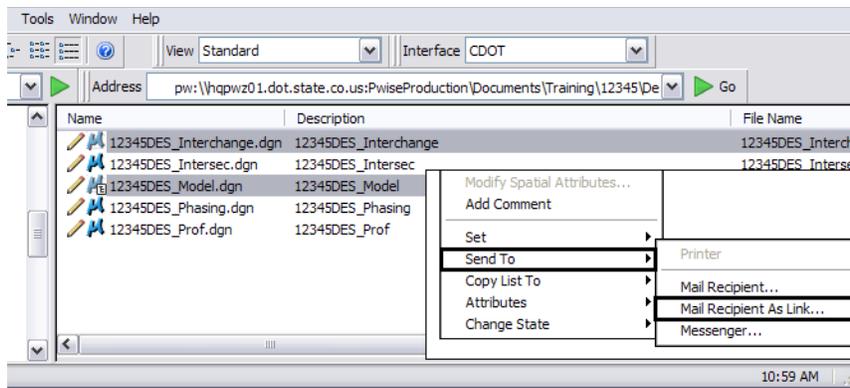
Outlook messages are stored in ProjectWise with the *.msg extension and appear in the explorer window with the  icon indicating the file is an Outlook message file.

Sending ProjectWise Document Links via E-mail

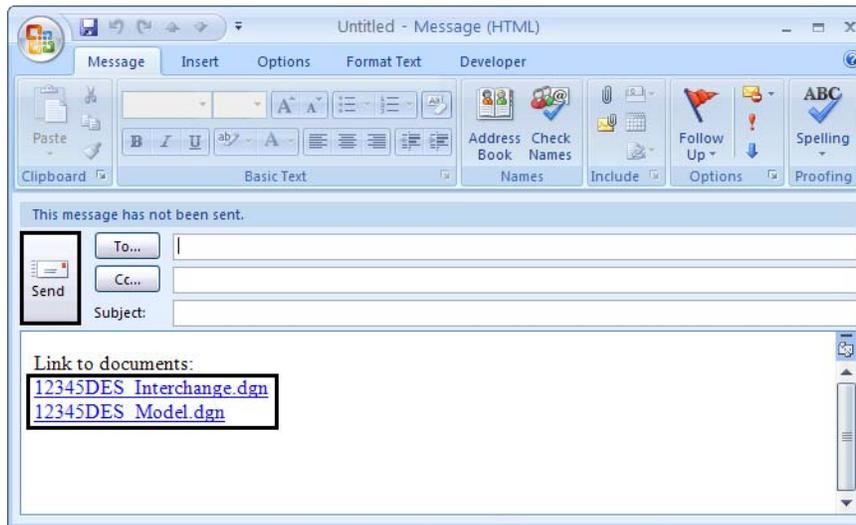
Sending someone a link to a document instead of the sending the document itself is a great option if the recipient has access to ProjectWise. This method of sharing files reduces the file size of the e-mail and has the added benefit of reducing the number of copies that are created for a given file.

To send a link to a project document:

1. Right click on the document you want to send a link to.
2. Click on **Send To** from the menu and then **Mail Recipient as Link**.



3. An Outlook message will be created with the link to the selected file in the body of the message.
4. Modify the message as needed including adding recipients, subject, etc and then press the **Send** button.



5. To open a link that is sent to you, simply click on the link. ProjectWise will open (if its not open already) and will highlight the file associated with the link.

- At this point you can review the file using any method you choose such as, view, check out, export, etc.

Note: Unlike exported documents, if the link being sent is a MicroStation drawing that has references, links to any reference files will not be created in the e-mail message. However, the recipient will be able to access the references by using the link to the master file.

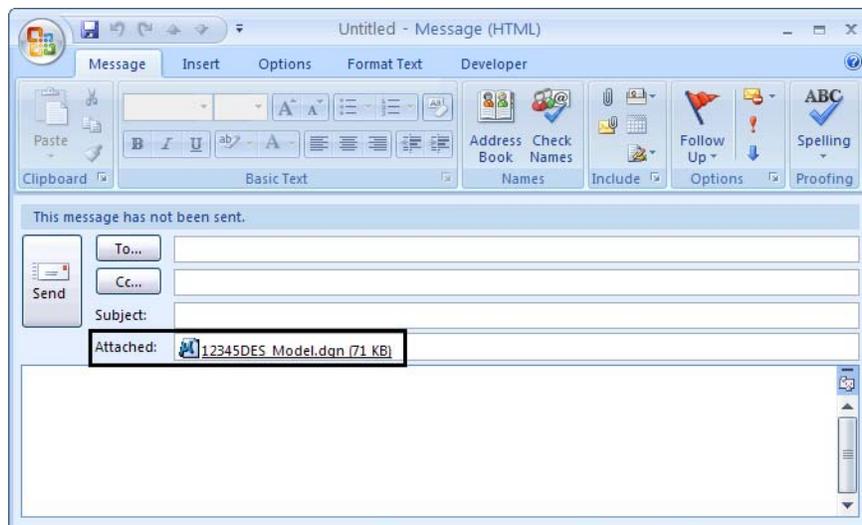
- To send a link to several documents that are stored in different directories, use the **Advanced Search...** tool and toggle on the **Show results in a new window** to create a list of documents that will included all the documents you want to create a link to. Once the list of search results is generated, select the files from the search result window and then follow steps 1 - 4 above.

Sending ProjectWise Documents via E-mail

Sending the actual project document maybe necessary if the recipient doesn't have access to ProjectWise.

Note: Since any IT limitations on the size of outgoing e-mail attachments still apply to e-mail generated by ProjectWise, you will need to consider how big the file attachment will be before using this option.

The steps to send a document directly from ProjectWise using Outlook are the same as those above except you would chose the option **Mail Recipient...** instead of Mail Recipient as Link... Below is an example of an Outlook message with an attached file generated by ProjectWise.



ProjectWise Messenger

The ProjectWise Messenger is a tool that allows ProjectWise users to communicate with each other from within the ProjectWise environment. Access Messenger by clicking on **Tools > Messenger...** from the ProjectWise menu.

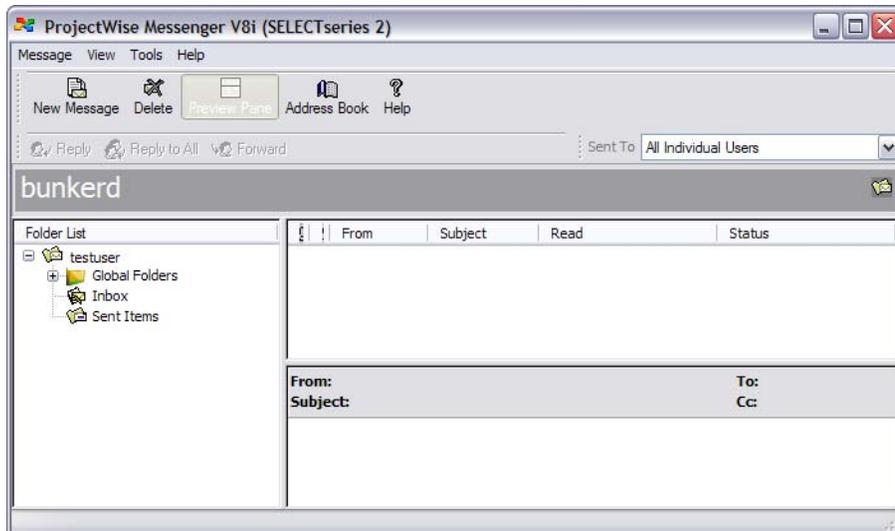
Because Outlook is so widely used, Messenger may not fit into the workflow for a specific project. However, Messenger is a good tool for the ProjectWise Administrator to occasionally send notices and information that apply to all ProjectWise users. When you receive a message from Messenger, the following notification box will appear.



Click on **Yes** to read the new message.

ProjectWise Messenger is similar to Microsoft Outlook in appearance and function. On the left are the message folders, on the right are the list of messages and the message preview.

Two basic types of message folders are available, Global folders (📁) and private folders (👤). Messages in the Global folders can be viewed by any ProjectWise user. The messages in a private folder can only be viewed by the folder's owner.



Messages in ProjectWise cannot be sent or forwarded to other e-mail systems such as Microsoft Outlook.

To copy or move a message within the ProjectWise Messenger folder structure, drag and drop the message from the folder it resides in to the folder you want to put it in. You can move messages from the Inbox to any private folder using the drag and drop method. However, when you drag and drop a message from the Inbox to a global folder, the message is copied instead of moved.

Note: You cannot drag and drop from the Sent Items folder to another folder.

With ProjectWise, it is a lot easier to keep project documents in a central location, share files with team members and stakeholders, and manage project documentation such as e-mail.