ProjectWise

D-3
Project Management
Records Guidelines

District 3 guidelines developed by
a Department that cares.

Contents

INTRODUCTION:

These guidelines show how **ProjectWise (PW)** is used to manage CADD Files, Scanned Documents, Consultant Files, Images and all information for a project. This guide should be used from the beginning of a project all the way until the as built markups are added. At which point it will be **<u>Archived</u>** and is write protected but still available to view.

1. The ProjectWise Training Manual can be found in ProjectWise under IDOT Standards/Training/PW Deployment 2008/PW Training Information/Training Manual/IDOT ProjectWise Explorer.pdf

2. D-3 Project Management Records Guidelines for PW can be found under S/Design/PLAN PREPARATION GUIDELINES and OTHER GUIDES/ProjectWise for D-3 Project Management Records Guidelines.docx or Region 2/District 3 SharePoint site/Document Tab/ ProjectWise for D-3 Project Management Records Guidelines.docx.

3. All bureaus should include the contract number in the header of each piece of correspondence relating to project to make filing easier in ProjectWise.

4. The PW Administrator (Mike Wasilewski) will be the contact person for questions concerning implementation of ProjectWise procedures.

5. Each bureau will be responsible for inputting data as defined in the D-3 Project Management Records Guidelines.

   - Each bureau may keep separate files as usual but should copy this information to PW.

   - PW will be the location for all documentation for each project from the start of Phase I until the project is archived after final acceptance from Construction.

PROJECT NAMING:

All projects will be stored in an individual project folder. The folder is labeled with the PROJECT NAME. You can find a project's name by looking in the "CADD & Survey Projects" database. When searching CADD & survey project status, any data field can be used (P#, D#, contract #, …). The shortcut is: "S:\ACCDAT\CADD & Survey Projects\SURVEY.accdb". All active and archived projects are in this database if they include CADD drawings (since 1988). Read rights to view this database are set by the Office Coordinator (Marti Pelka). Starting April 2008, all Projects are named using the **CONTRACT NUMBER,** ex. D366408, per the **"CADD Roadway and Structures Project Deliverables Policy"** found on the IDOT Web site.

With the project name from the database, the project can be located in PW.

PW works like Windows Explorer and allows for dragging information into the project. To copy a file to a directory outside of PW, it must be Exported. This will be discussed later. Only an administrator can delete files from PW.
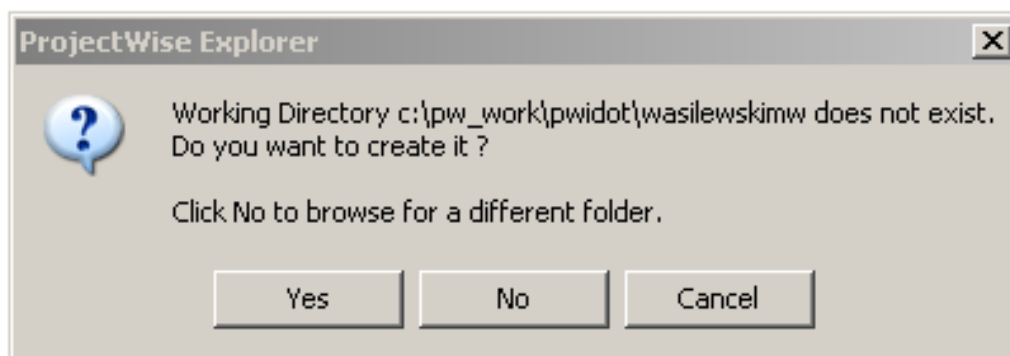
This shows the 5 main folders in PW under District 3.
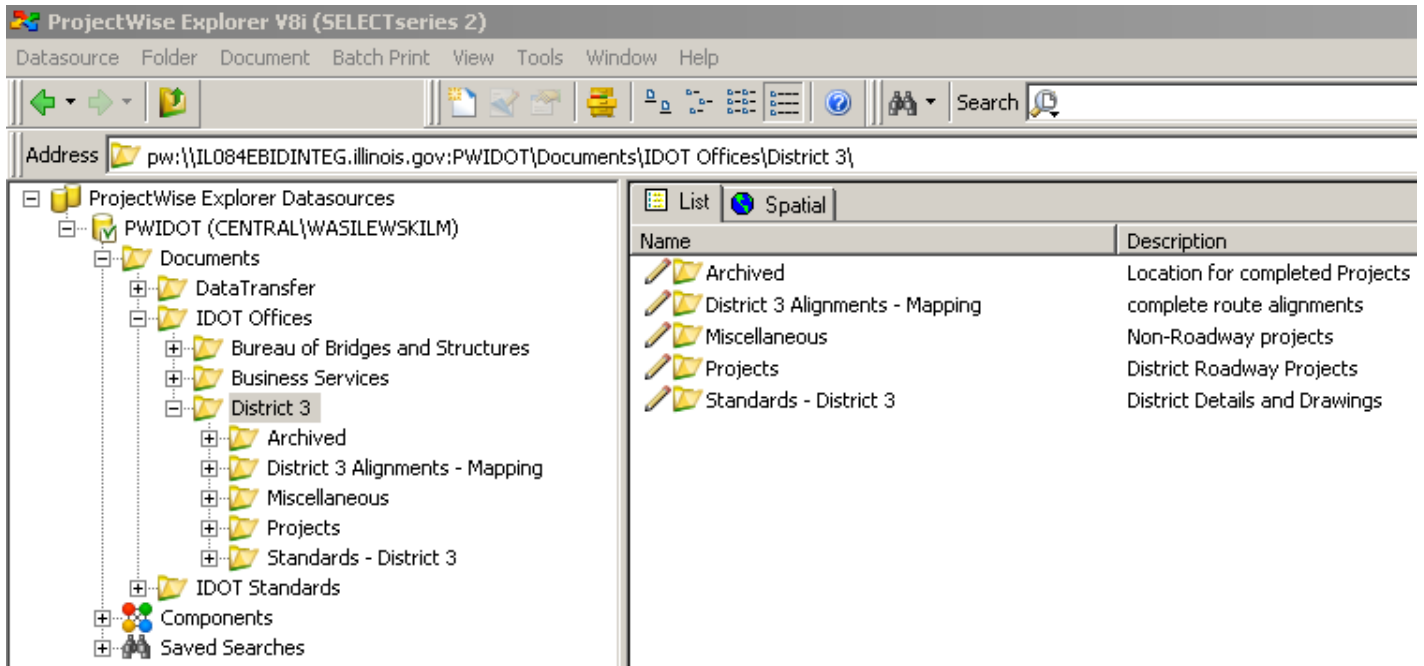
FIRST TIME USER:

The following screen shows up the <u>first</u> time a user logs into PW on a machine.

Always answer this with "YES"

ACTIVE PROJECTS:

Under the "**Projects**" folder, you will find all active projects. When "Projects" is selected the right side of the screen shows all the project names and a description of the project. Left of the project name is a yellow folder with a multi colored X, this represents an active project. The <u>pencil</u> to the left of it means this is a <u>writable</u> project or file. The symbols used by PW will be briefly explained in this manual. Detailed explanations can be found in the PW Training Manual.

EXAMPLE PROJECT:

The image below shows the "Projects" folder expanded, with a specific project **"D366408"** expanded. The screen area on the right side shows the five main folders of a project.

CADData FOLDER:

Starting with **CADData**; this folder contains CADD and Survey files that are done in-house or consultant files that have been copied here and modified. Every section/bureau has a folder dedicated for their files. A folder is "read only" to other sections and only your section has write access. All permissions are set to the user. The files on the right are in the highlighted folder **CADdrawings**. The file naming conventions are a State Standard per the **"CADD Roadway and Structure Project Deliverables Policy" (April 1, 2008).**

CADdrawings & CADsheets	Phase 2
Construction	Construction (as built markup and construction changes)
Design	Phase 2 Development
Electrical	Operations
Environment	Environmental Unit
Exhibits	Phase 1 & 2
Geometrics	Geometric Unit (intersection/interchange information)
GEOPAK Project Mgr	Design software (Talk to PW Administrator for training – Phase 1, 2, Survey)
Geotechnical	Materials (borings .dxf format)
Hydraulics & Structures	Hydraulics Unit (bridge, hydraulics, TSL's)
LandAcq	Land Acquisition (parcels and R.O.W. plans)
Studies	Phase 1 Study
Surveys	Survey Crew (all survey data and alignments)
Traffic	Operations
Utilities	Utilities/Railroads
ViewOnly	Do not use

The most common files found in CADdrawings are:

D366833-topo.dgn	Set to State Plane Coordinates in a strip map format
D366833-prof.dgn	Continuous strip (of the profile digital terrain modeling)
D366833-DTM.dgn	3-D model of survey shots
D366833-xsec.dgn	xsections before placed on sheets

CADdrawings FOLDER:
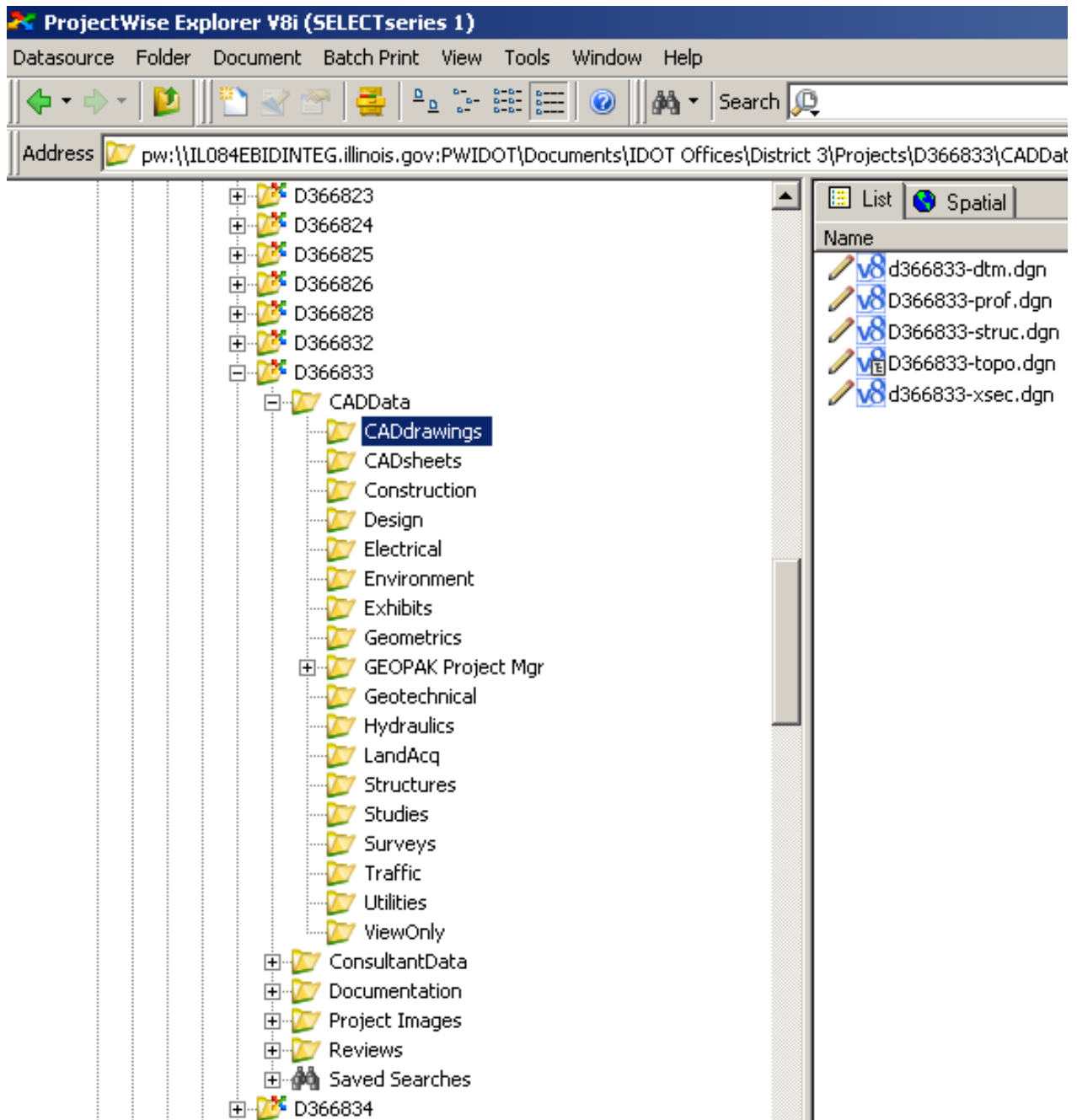
CADsheets FOLDER:

CADsheets folder: This folder contains CAD sheet drawings using information attached from the **CADdrawings**. File names are in a format that describes the content.
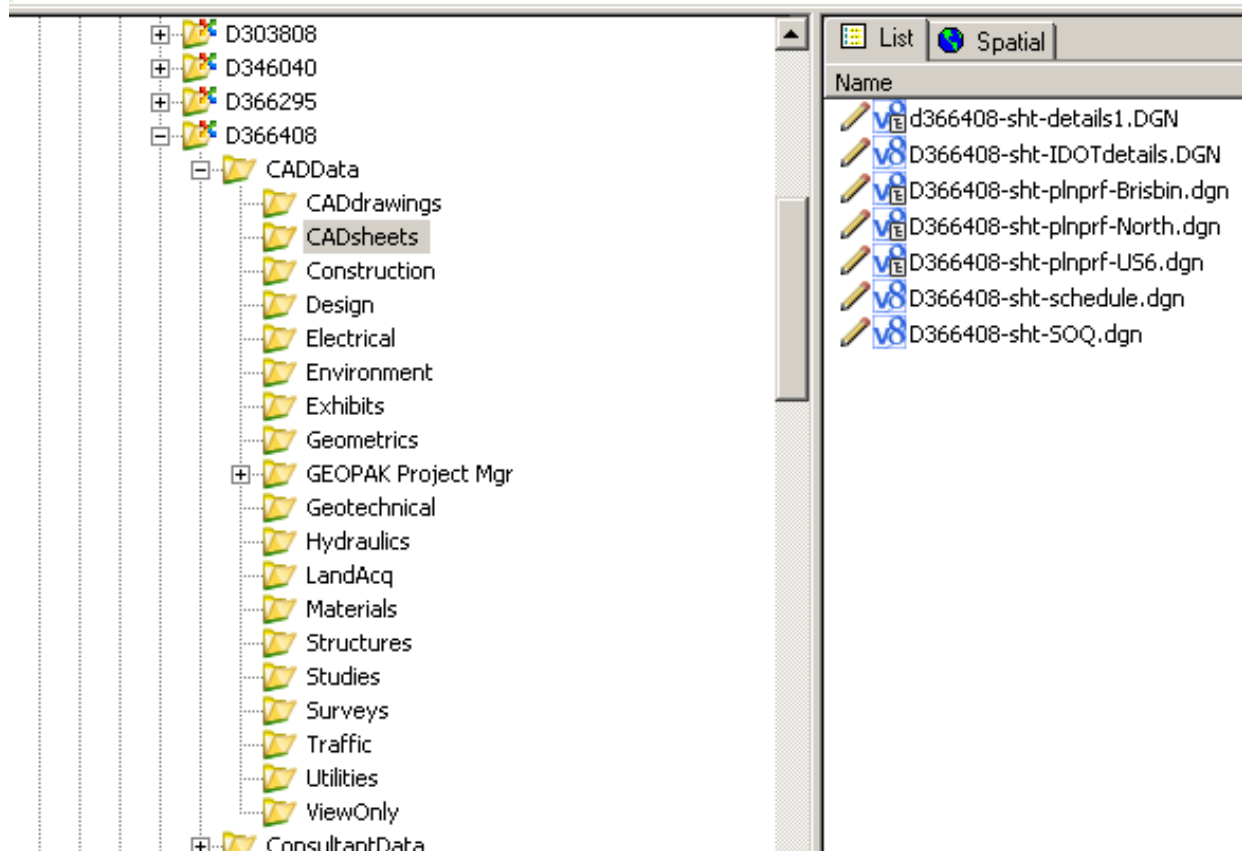
SURVEYS FOLDER:

Surveys: The files in this folder are always <u>write protected</u>, indicated by the <u>open book</u> in front of **D366833-survey.dgn.** The file contains the graphic drawing of the survey shots. Files with the .txt extension or .asc (the old version) contain the survey shots in the text format, which can be opened as "read only" to view individual survey data. The rest of the file names reflect the data in them.
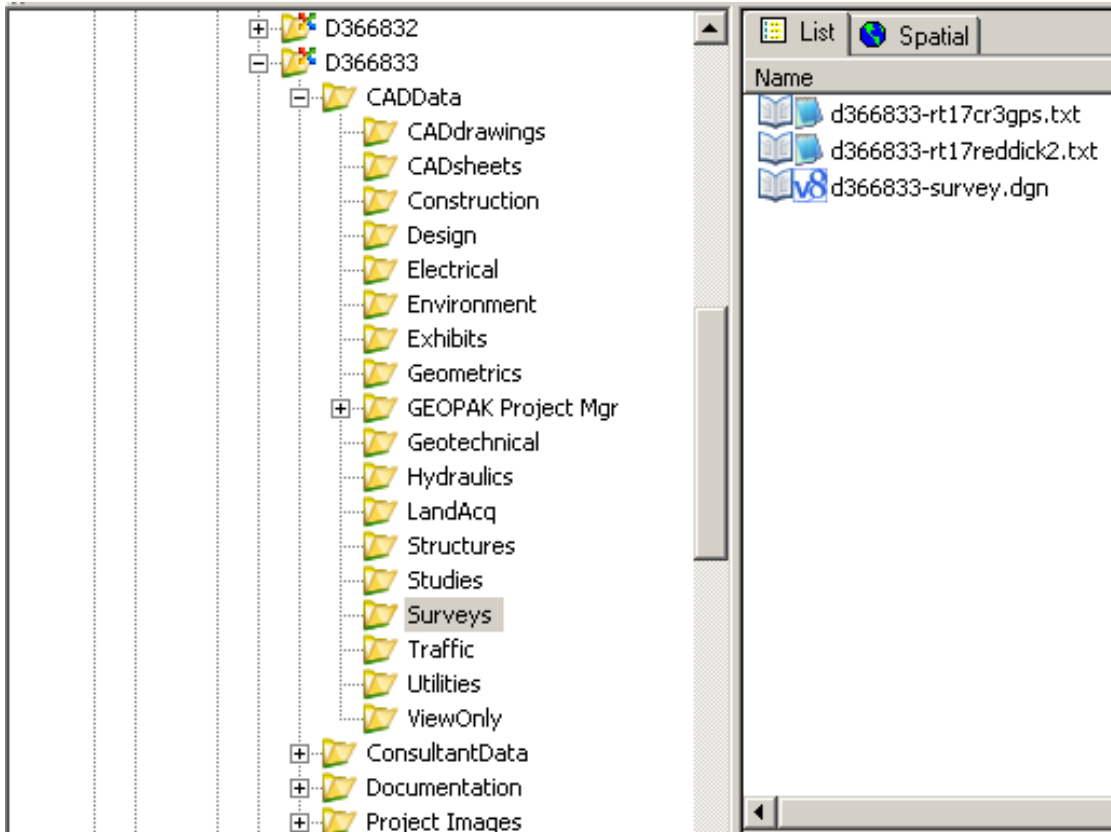
CONSULTANT DATA:

ConsultantData: The image below shows an expanded folder structure with multiple consultants with multiple submittals. The files are always write protected and loaded by the PW administrator. Each person providing consultant data to the PW administrator is responsible for the folder information the file belongs under.
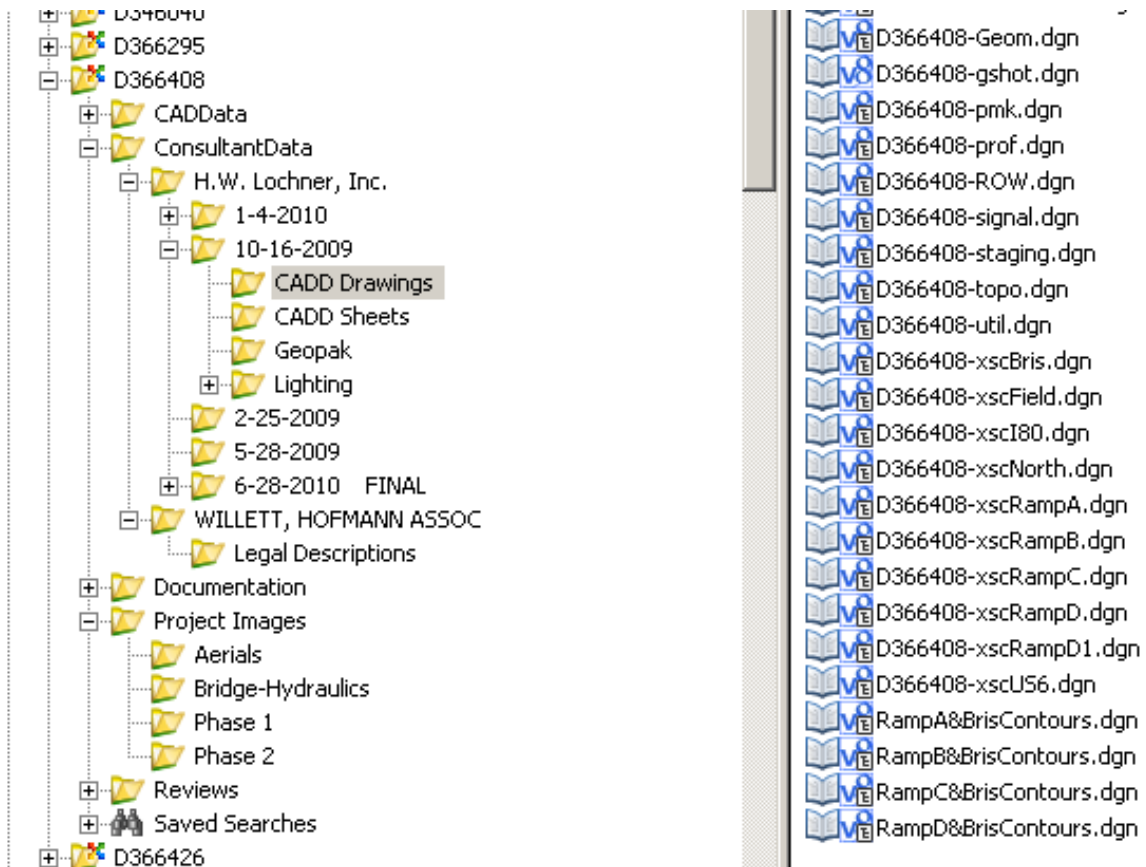
DOCUMENTATION FOLDER:

Documentation: This folder is for scanned documents including, e-mails (important to project), and Excel files (ex. Schedules – linked to CADD files). The image below shows files on the right that are in the COMMITMENT FILE. All users have **READ ACCESS. WRITE ACCESS** is allowed to folders based on your section. **NOTE** the format of the date on the documents to the right (yyyy-mm-dd) for easier retrieval.

Cover letters and interoffice transmittals will be scanned and placed in PW by the Studies & Plans Secretary.

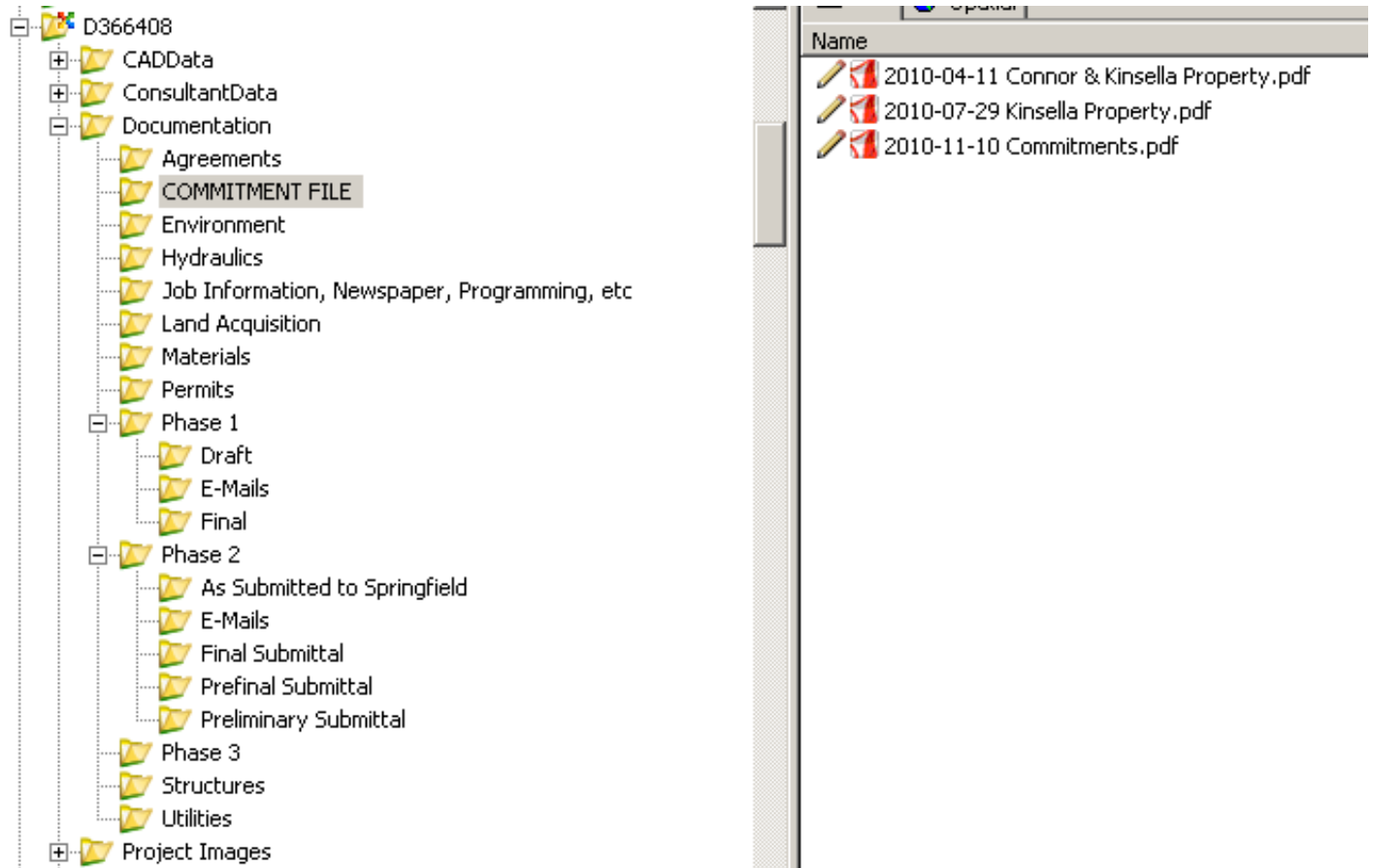Agreements: Urban Planning Section responsible for scanning and including any Local Agency agreements. Project Liaison/Manager for Phase 1, 2, and 3 will be responsible for scanning engineering agreements. The Project Liaison/Manager will scan all documents typically filed in the red agreement folder (PTB advertisement, selected consultant's statement of interest, agreement packets, signed agreements and supplements, etc.).

COMMITMENT FILE: Unit Chiefs are responsible for scanning any commitment file documents and placing it in PW that does not fit in any of the other documentation folders.

Environment: Environmental Unit is responsible for scanning all special reports not found in approved Phase 1 report (e.g. 4F, P.E.S.A., P.S.I., 106 Reports, etc.).

Hydraulics: Hydraulics Unit is responsible for including all B.C.R.'s, SGR's, Hydraulic Reports, etc. Plan Room Technician may be used to scan large documents. Studies & Plans secretary and temporary help can be used to scan smaller projects.

Job Information, Newspaper, Programming, etc.:   Studies & Plans Secretary to scan job authorizations. Program Unit to scan program information.

Land Acquisition: Land Acquisition is responsible for scanning plats, parcel info, etc.

Materials: Materials Department will scan information including all Soils Reports, Geotechnical Reports, pavement core information, boring logs, etc.

Permits: Hydraulic Unit is responsible for including all 404 permits, 401 certification, IEPA permits, etc. in this section. Project Engineers will be responsible for including project related city/village/property owner permits (e.g. sanitary sewer and IEPA water permits, etc.). Utility permits will be included in the Utilities folder.

Phase 1:   Report writer is responsible for including all Phase I report documentation including approved project report.

Phase 2:   Unit Chief is responsible for including all information concerning design documentation. This includes scan of computation files and any correspondence beneficial to interpretation of plans and quantities. Excel files of schedules, summary of quantities, charts are in this folder and linked to the CADD sheets. The folders for submittals are for Plan Sheets in .pdf format and the comments from the reviews.

      E-mails need to be named by: yyyy-mm-dd, Time, Subject title. E-mails should be saved as a .msg format (i.e. 2009-06-30, 949am, Materials Plan Review.msg)

      Squad leaders are responsible for placing e-mails in PW. Only important e-mails should be saved here. Temporary storing e-mails on S: or P: drives is acceptable to help decide which ones are important to store in PW for future reference. E-mails can be stored in PW at any time; the procedure for storing e-mails should be determined by the project's manager. This can be used by Phase 1, 2, & 3.

Phase 3:   Construction will scan all files including authorizations, progress schedules, correspondence, etc.

Structures: To scan TSL, Plan Development Outline, and Bureau of Bridges & Structures comments.

Utilities: Project Support Engineer is responsible to include existing utility location information, utility plan submittal letters and utility correspondence, SUE data and railroad coordination.

PROJECT IMAGES FOLDER:

Project Images: All pictures taken on field checks should be loaded here under the appropriate folder. Before going on a field check, check here to see if someone has already taken the photos.

Exception: The folder "Aerials" contains all of the data received from Springfield – aerial photography, topo and coordinate data.

      Aerials – CADD responsible for input.
      Bridge Hydraulics – Hydraulics responsible for input of photos.
      Construction – Construction photos.
      Environment - ESR
      Phase I – Report Writer is responsible for photos. Safety project/programming photos shall be included in the Phase I file.
   Phase II – Unit Chiefs are responsible for all photos.

REVIEWS FOLDER:

|	
Reviews:	Phase 2
	30% Field – Unit Chief responsible for including any documentation prior to preliminary submittal concerning plan reviews.
	70% Design Preliminary – Unit Chief responsible for including preliminary reviews and mark-ups.
	95% Pre-final – Unit Chief responsible for including pre-final review documents (review letters and plan mark-ups).
Final:	This folder is for the as sent to Springfield.
	Documentation – Unit Chief responsible for including documentation of final approval and close-out of plans.
	Plans - .pdf format (The CADD Unit will create the .pdf's.)
	Special provisions – Microsoft Word format
Operations:	Bureau of Operations is responsible for including traffic signal information, scans of TS plan reviews and speed studies.

ARCHIVED PROJECTS:

Projects are moved to the archived folder by the PW administrator after the as-built changes are added. Only folders containing files are archived. All projects in the archived folder are read only. The information can be copied to active projects for editing.
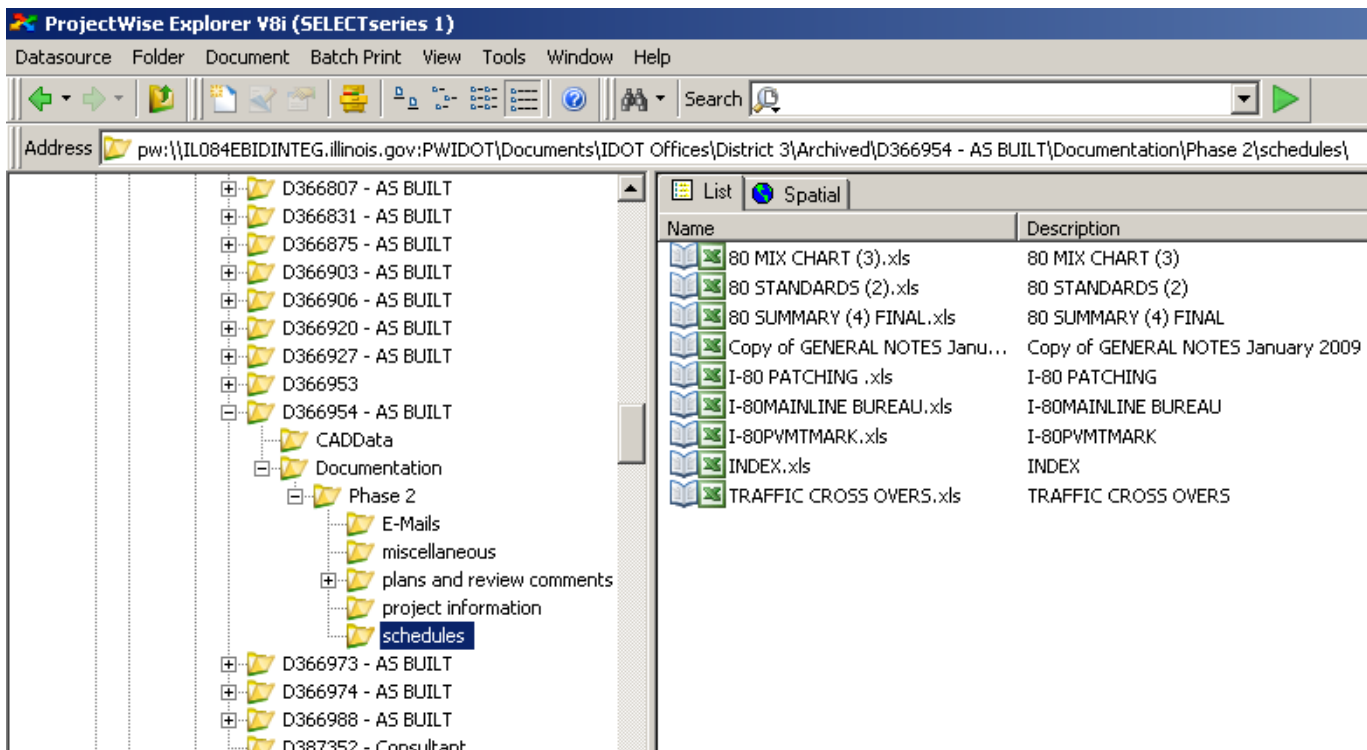
OPENING FILES:

Right click on an item to open the file. It is now checked out to you. When done with the item, close out of it and then you will get a box to check it back in. If you are only opening a file to view and not make additions, it is recommended to open as "read-only" by right clicking on the file and choosing "open as read-only". Close out by clicking the "x" on the upper right corner.
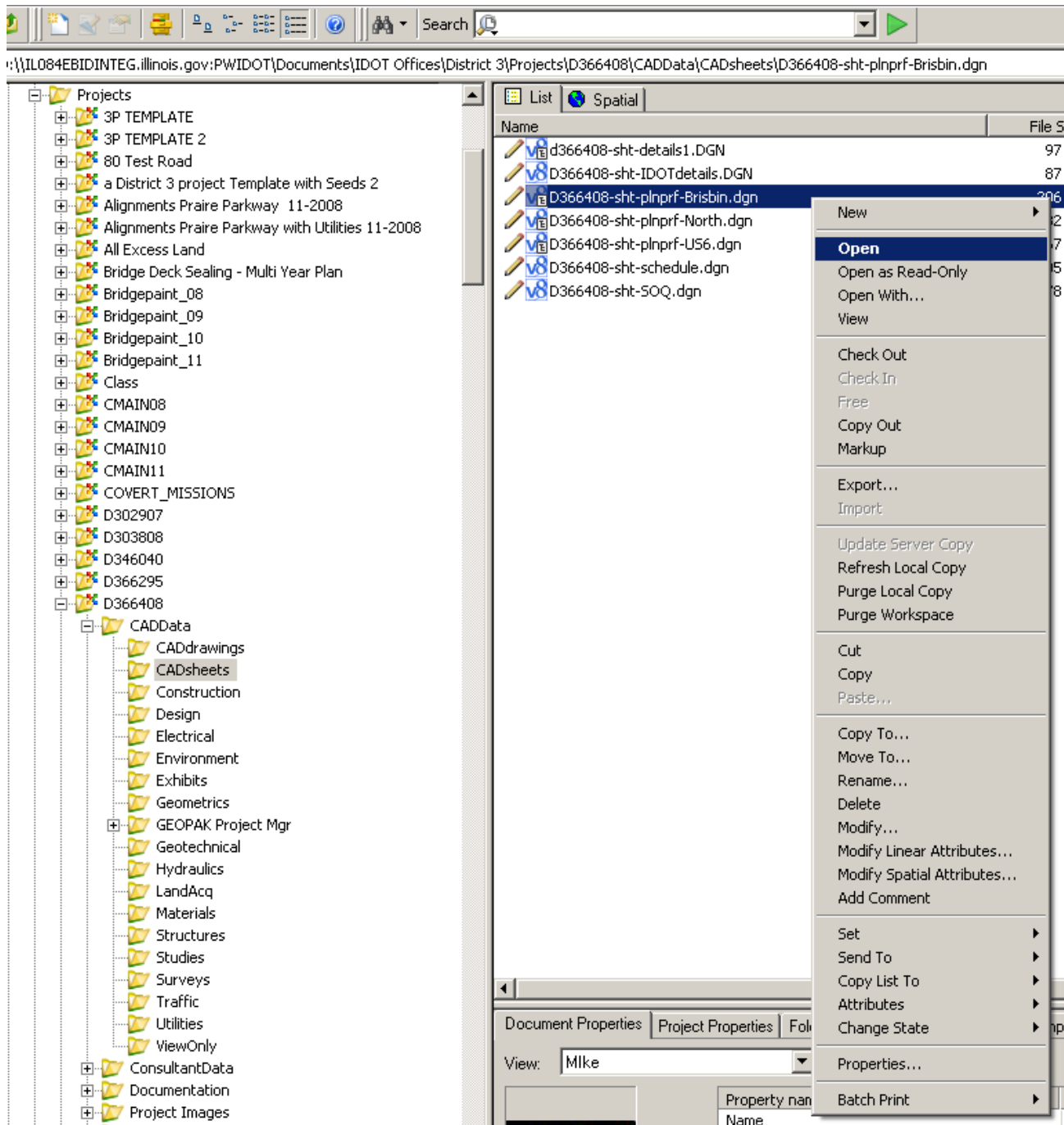

All files need to be checked in at the end of every day. If a file is checked out, no one else can edit it, but they can view it. More important, the file can only get backed up if it is checked back in PW; otherwise, you can lose your work.

FREE – This is both a good and bad command. If this is chosen, the file will reset to the original data like you did no work in it. This is good if you make a large error. The bad part is, it is just under "check in". If you accidentally hit "free", contact the PW administrator. Sometimes the work can be retrieved.

The padlock shows someone else has the file opened. The red check shows you have it opened.
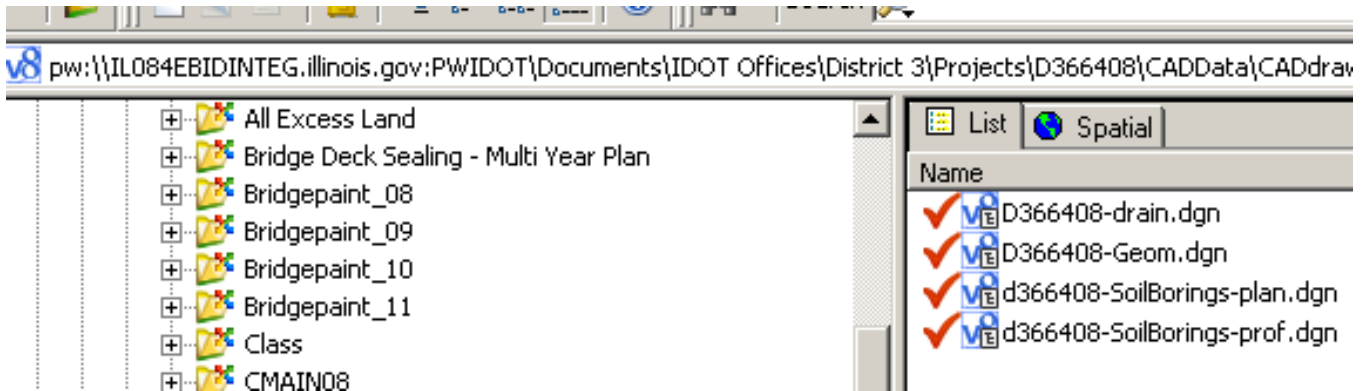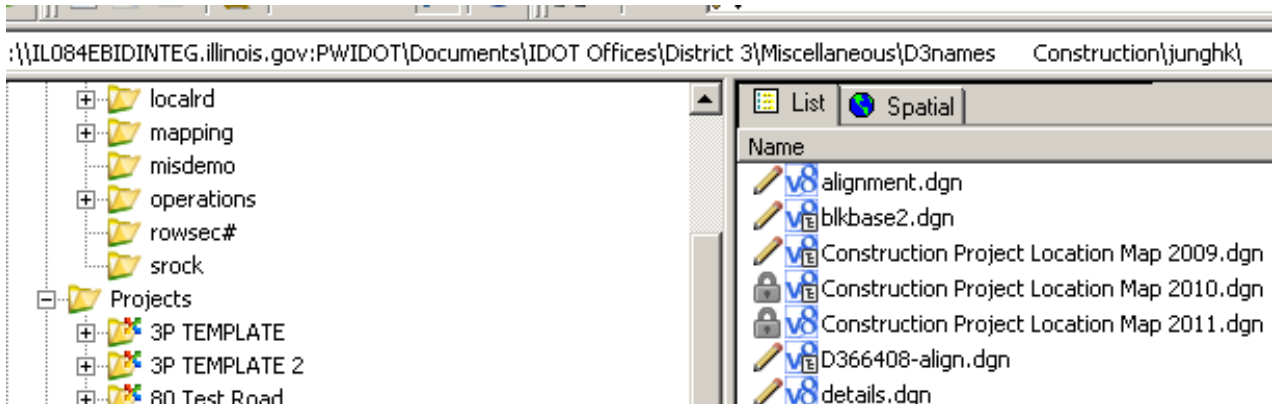
When adding data to a specific file, you must first have the folder open by clicking on the specific folder on the left side to highlight it (i.e. commitment file). Then drag and drop the file or files from your S:, C:, F: drive or where ever the files reside, into the right side of the PW window. Do not use copy/paste method.
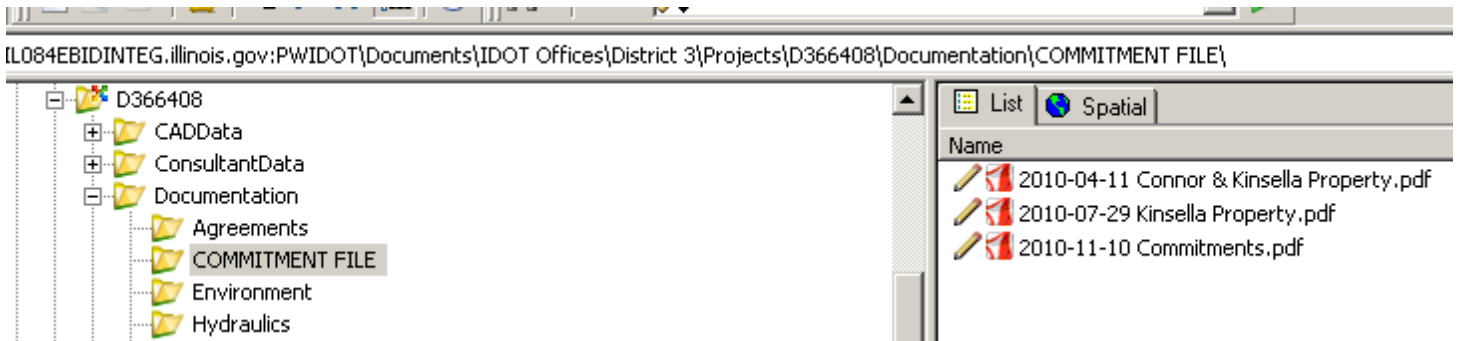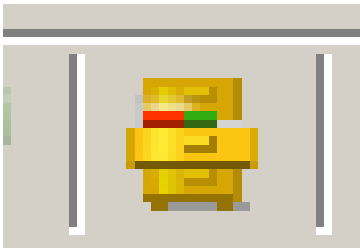
CHECKING IN FILES:

Local document organizer shows the files that are checked out to your machine. This is where they are checked back in. They can be selected by the shift or ctrl keys. After the files are selected, right click on them to get the check-in option.
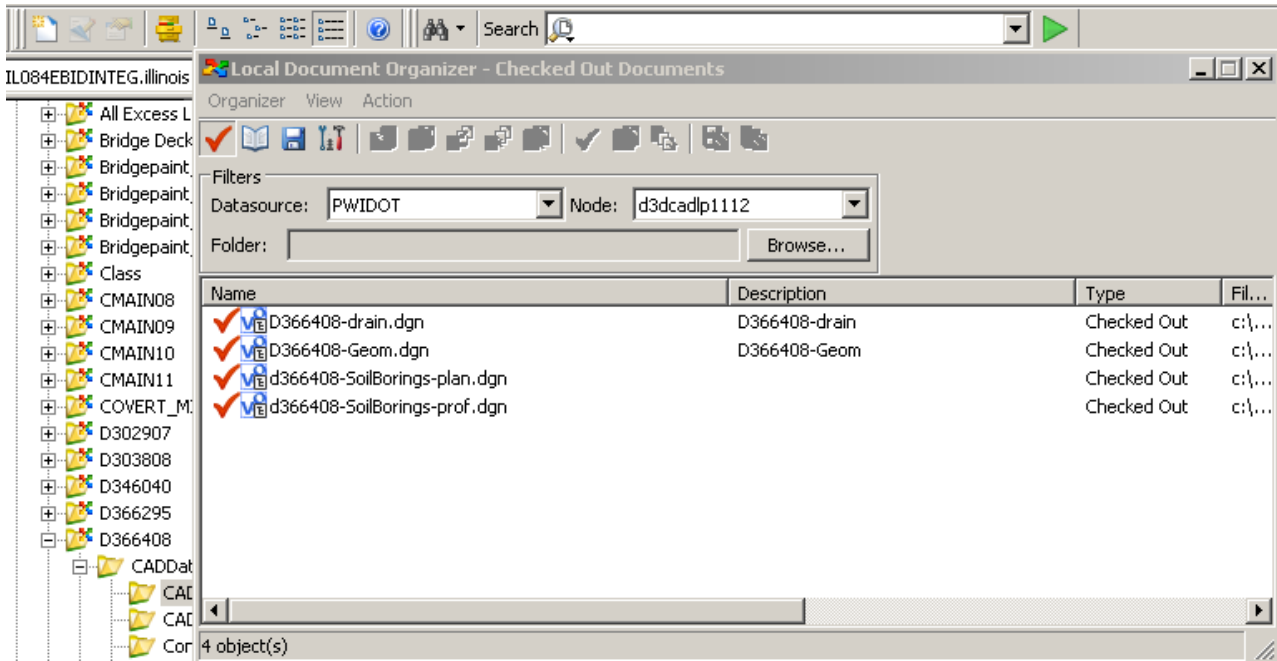
This is larger view of icon.

CREATING FILES:

Seed files are the blank files used to create files in an active project. Shown here is the path to the seed files. Click once on "District 3 Seed Files". You will see the seeds on the right. Open projects by clicking once on the + in front of it. Then use slide bar to navigate to your project. Only click on the + once to open your project folders. Then left click on seed file, hold down, drag file over top of folder the file needs to go in, and let go when folder turns bold.

Name	Description
D3xxxx3D-survey.dgn	D3xxxx3D-survey
D3xxxxx-DTM.dgn	IDOT english 3D file of .tin
D3xxxxx-profile.dgn	Design profiles
D3xxxxx-seed.dgn	Compiled proposed data of project area
D3xxxxx-sht-blog.dgn	Geotechnical Boring Logs sheet file
D3xxxxx-sht-cover.dgn	Project cover sheet
D3xxxxx-sht-details.dgn	Project detail drawings
D3xxxxx-sht-plan.dgn	Design plan sheets
D3xxxxx-sht-plnprf.dgn	Design plan & profiles
D3xxxxx-sht-schedule.dgn	Project schedule of quantities
D3xxxxx-sht-SOQ.dgn	Project summary of quantities
D3xxxxx-topo.dgn	Compiled proposed data of project area

IL084EBIDINTEG.illinois.gov:PWIDOT\Documents\IDOT Offices\District 3\Standards\District 3 Seed Files\D3xxxxx-se

Seed files are the blank files used to create files in an active project. Shown here is the path to the seed files.

If wizard shows up, check "make this wizard the default", click the "no wizard", then click "OK".
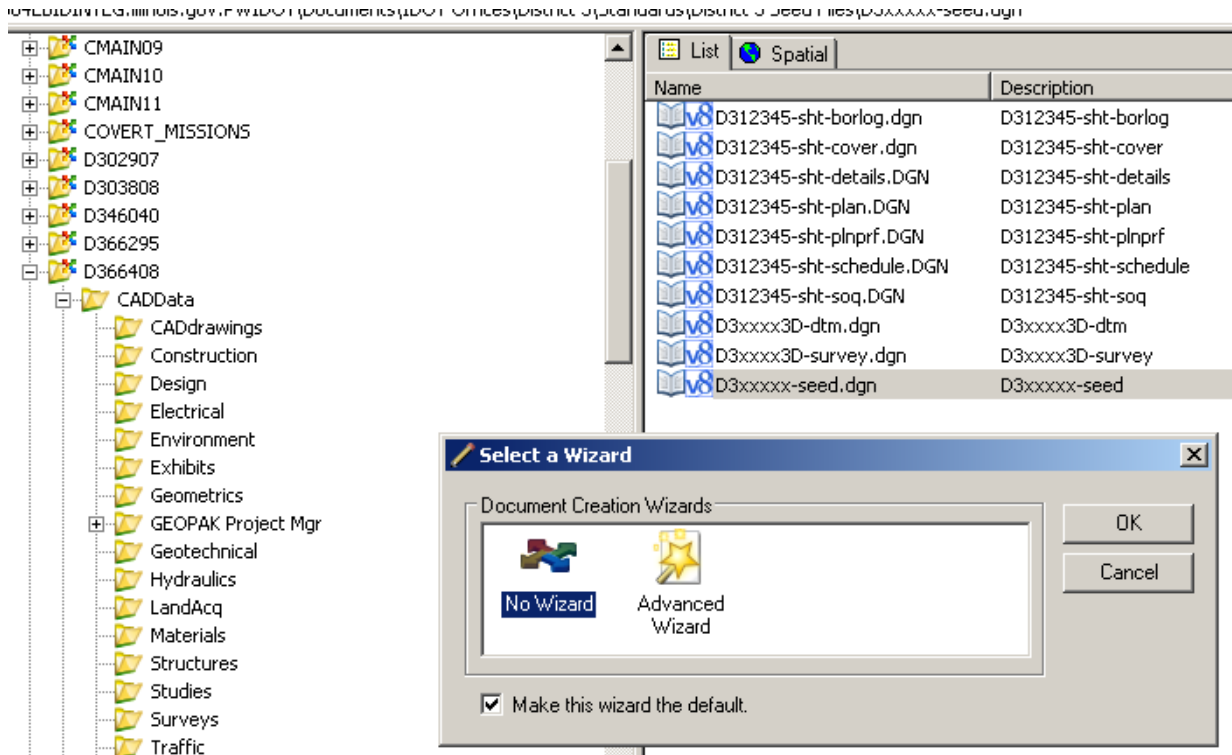
## RENAME FILES:

Now the file(s) needs to be renamed. To rename a file, right click the file you are renaming. Go to "Rename".

New	▶
Open	
Open as Read-Only	
Open With...	
View	
Check Out	
Check In	
Free	
Copy Out	
Markup	
Export...	
Import	
Update Server Copy	
Refresh Local Copy	
Purge Local Copy	
Purge Workspace	
Cut	
Copy	
Paste...	
Copy To...	
Move To...	
Rename...	
Delete	
Modify...	
Modify Linear Attributes...	
Modify Spatial Attributes...	
Add Comment	
Set	▶
Send To	▶
Copy List To	▶
Attributes	▶
Change State	▶
Properties...	
Batch Print	▶
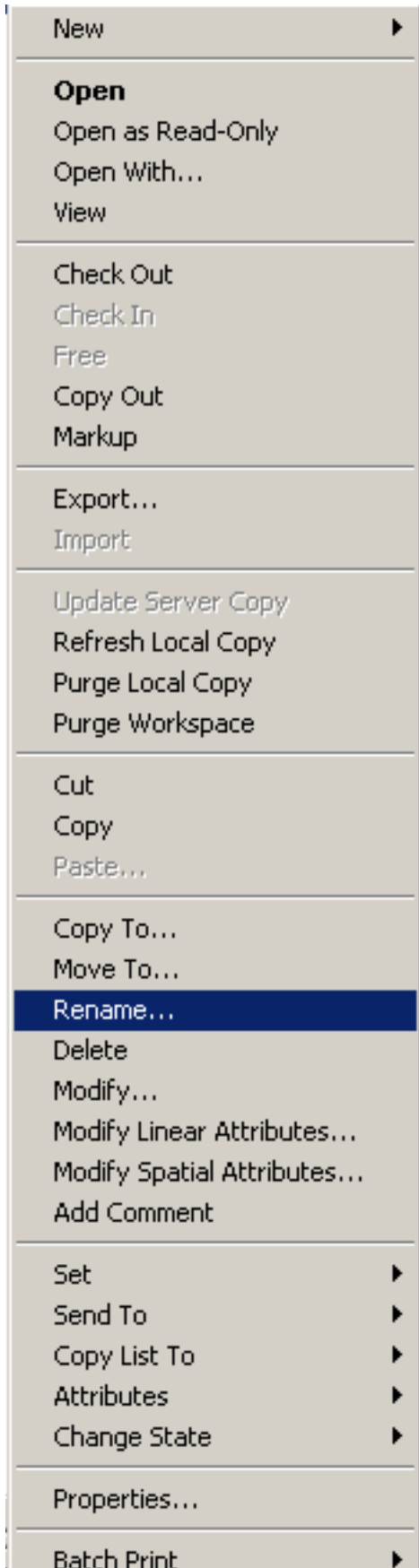
When renaming the document, enter new name according to standard format. The "Name" and "File Name" must be the same. "Description" is optional and does not have to be the same. The file names have a standard format. (See page 12, 13, and 14 of the "CADD Roadway and Structure Project Deliverables Policy".) Click OK
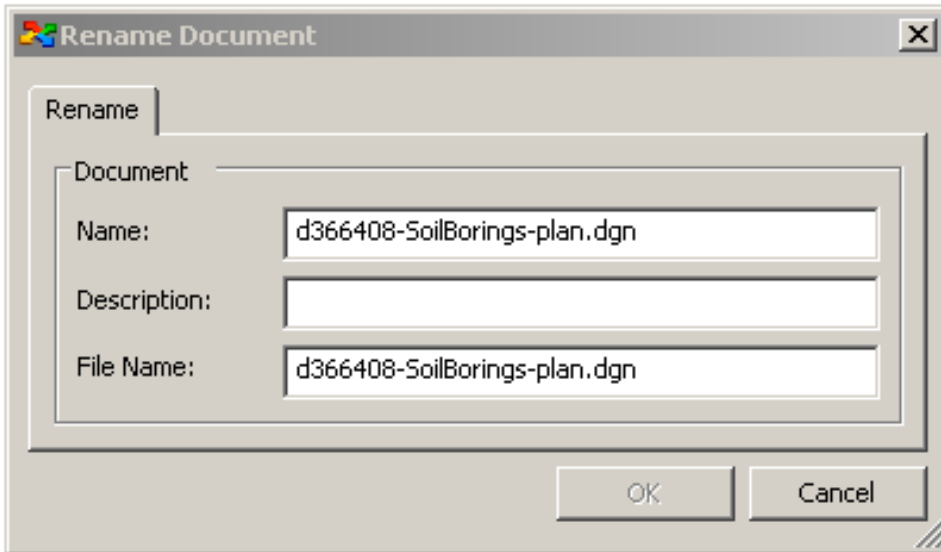
SEARCHING FOR PROJECTS:

SAVED SEARCHES: If the contract number is unknown, a search can be done here. A project can be searched by route, state park improvement, structures by county. Notice the path to saved searches. All District 3 routes should be listed. This looks at all projects – active and archived. Click on the folder to the left. The projects will show up on the right. From here, double click the correct project folder on the right to open that project.
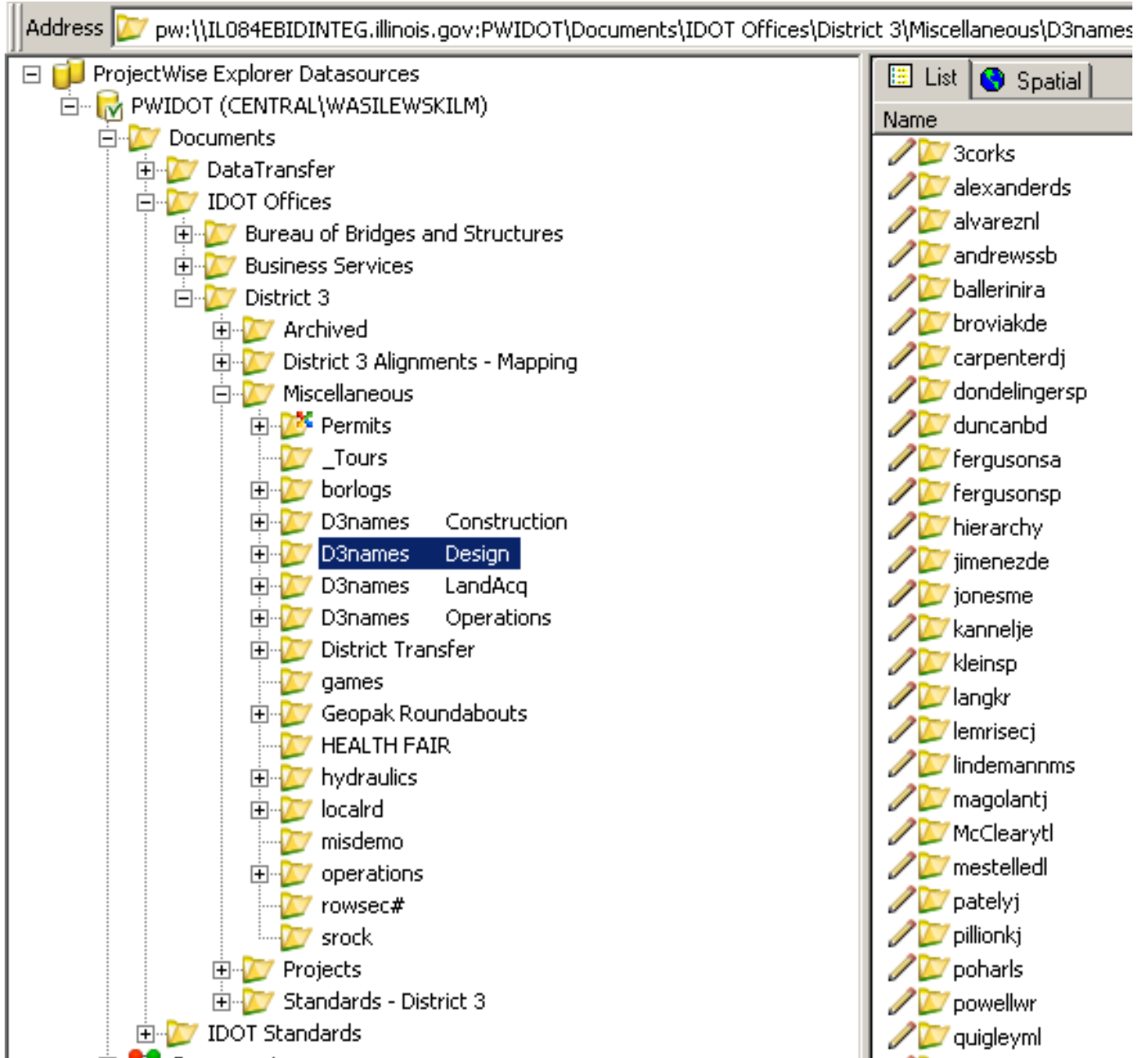
DISTRICT 3 STANDARD DETAILS:

All District 3 standards are in PW, both .dgn and .pdf formats. The path to the location of files is shown here.

MISCELLANEOUS CADD DRAWINGS:

Most users have a file of their own to draw in. This is for practicing in – not work drawings. All CADD work goes in its respective project.

PW TRAINING MANUAL:

The complete PW Training Manual is located in PW. The location is shown here.

# IMPORTING SCHEDULES, SUMMARY OF QUANTITIES, INDEX OF SHEETS, ETC.

To import Excel files from S: drive to PW:
- Create a schedule in Excel using S:Design/Plan Preparation Guidelines and Other Guides/Preparing and Importing Schedules 07-09.xls. Save and close file.
- Open an Explorer window and find the Excel file. Open PW where you want to place the file.
- Select file in Explorer window and drag over to PW window.
- Open the Excel file in PW.
- Highlight area of schedule that you want to show on plan sheet.
- Right click. Choose the Copy command.
- Open the .dgn CADD file where plan sheet is located. Load Microsoft Office Importer under Axiom tab.
- Make sure the two boxes are checked under import linking. Linking is not required; however, it saves fixing data in multiple areas.
- Make sure other settings are according to Preparing and Importing Schedules 07-09.xls.
- Click the left clipboard symbol in the Importer palette (Paste clipboard data into MicroStation). Place contents on plan sheet in .dgn file.
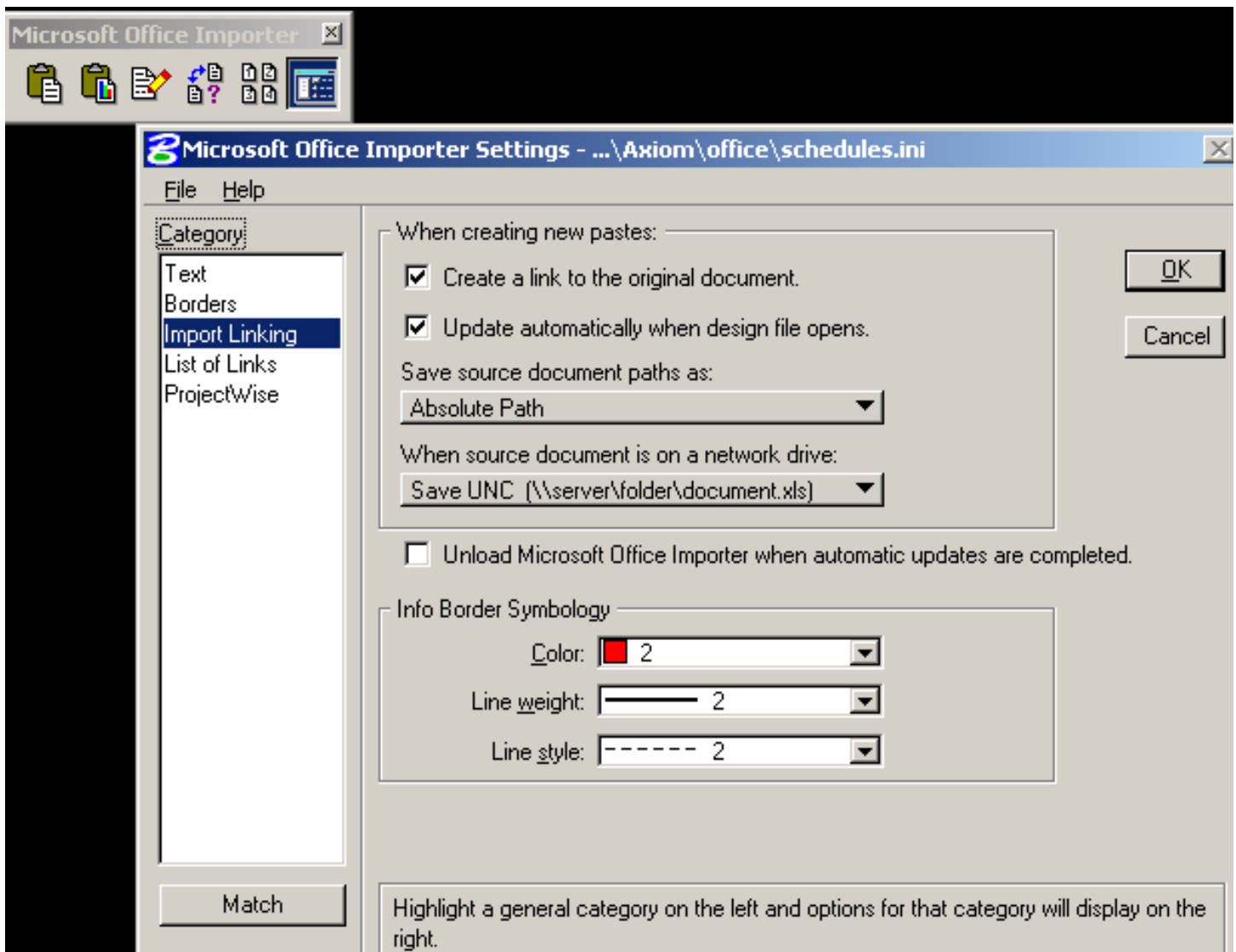
To make changes on plan sheets in CADD to the linked Excel file:
- Open the Excel file saved in PW.
- Make corrections to file.
- Save file.
- Go to PW window. Find Excel file that was corrected.
- Right click and choose Update server copy command.
- Open the .dgn file containing linked Excel file.
- Open Axiom palette Microsoft Office Importer. Click Manage an existing link. (A new palette shows.)
- Select the file you changed.
- Click update.
- Notice in manage an existing link, top left cell and bottom right cell can be entered to reflect added cells. This works with multiple schedules in one .xcsx file. (Sheet name is the, .x/sx tab name.)
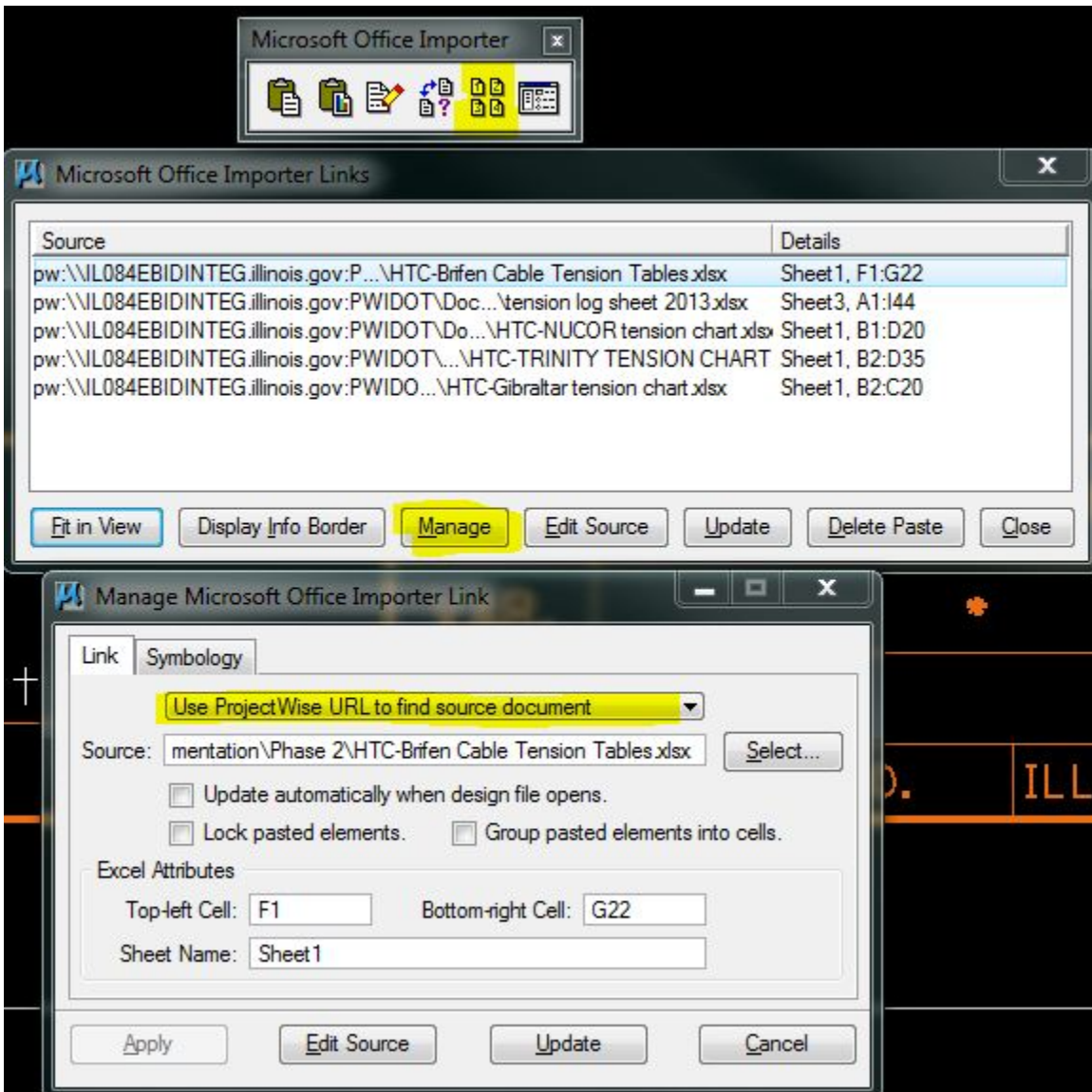
EXPORTING FILES:

To get a copy of files or a folder containing files out of PW, use the Export command by right clicking the folder or files needed.
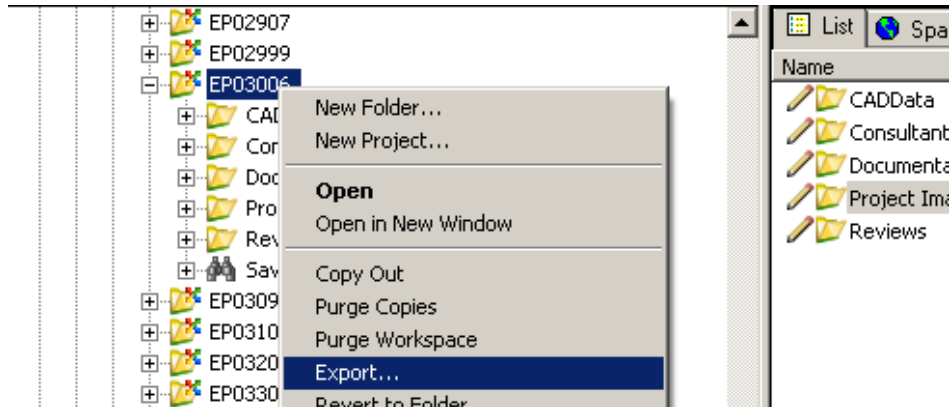

Make sure "Send to Folder" is on.

This is the location that the files will be exported to. The files need to go to a temporary location before they are placed in an e-mail, FTP site or placed on a disk. Example: folder TEMP on a c: drive. Notice the two boxes that are checked. These should be the only two needed. All attached reference files are automatically exported using these steps. Any folders that do not contain files will not be copied.
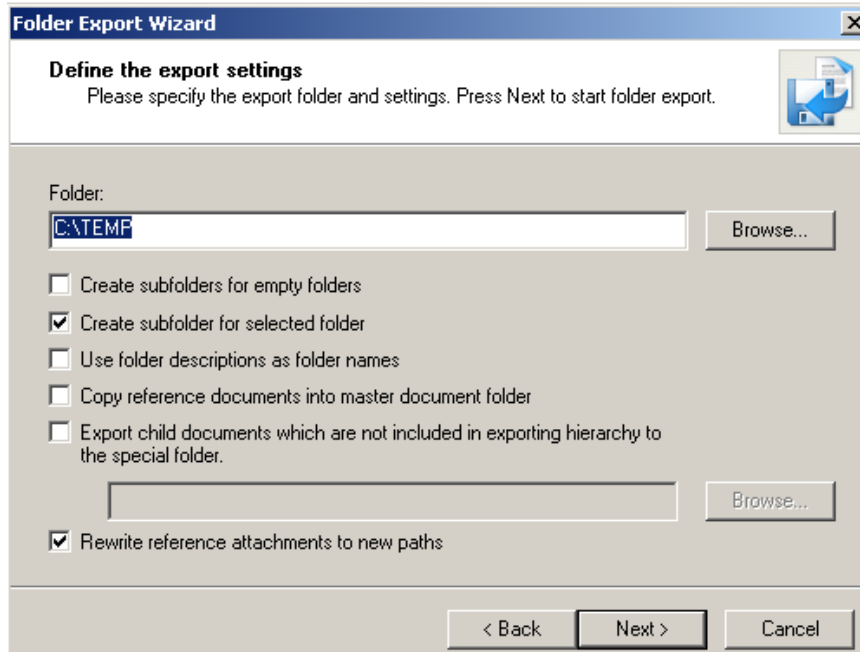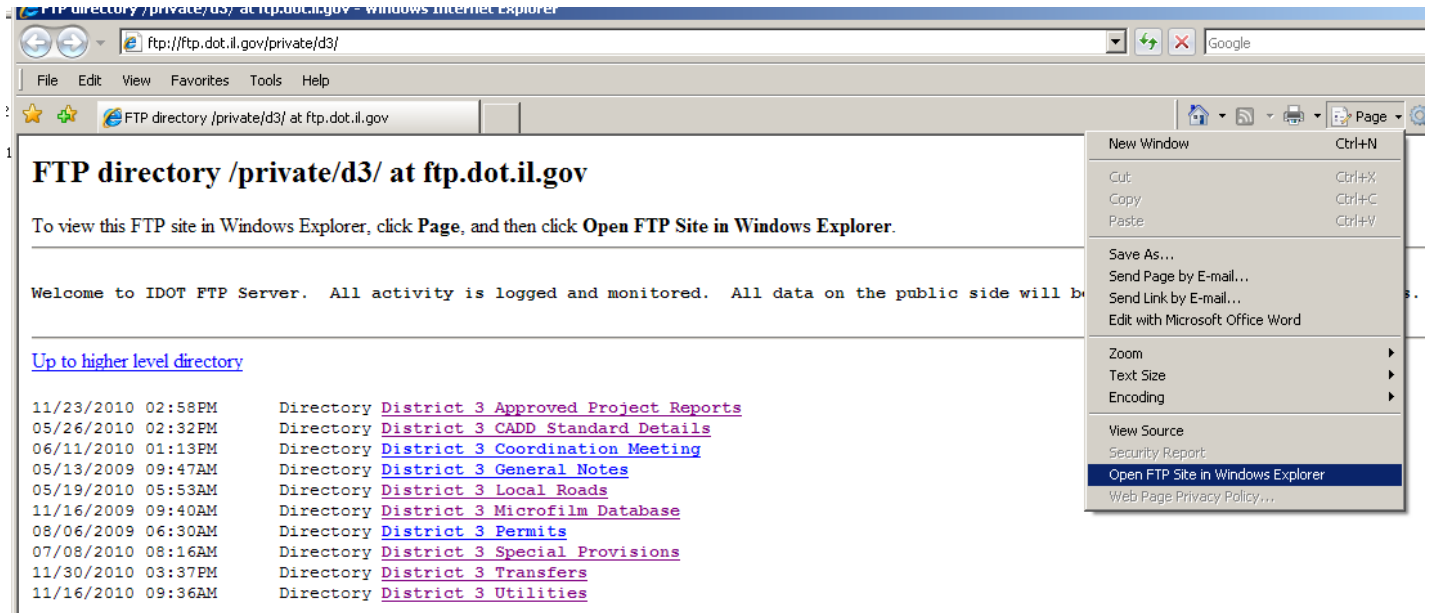

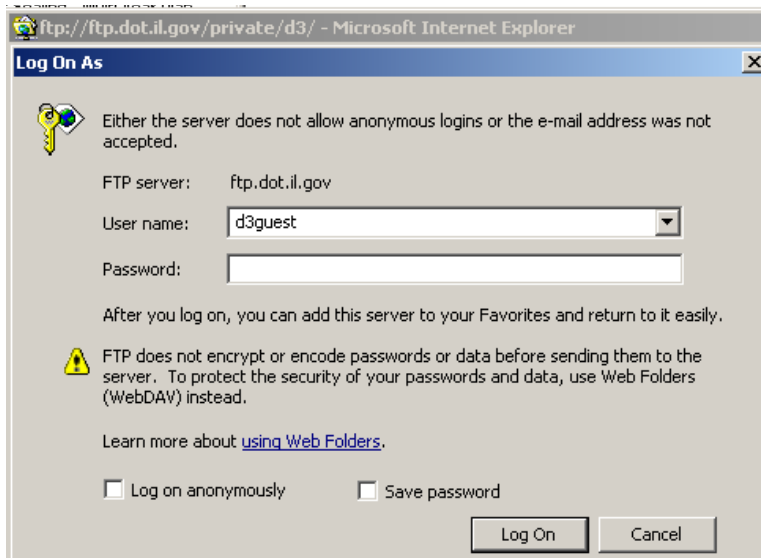When complete, this is the last palette. Click Finish
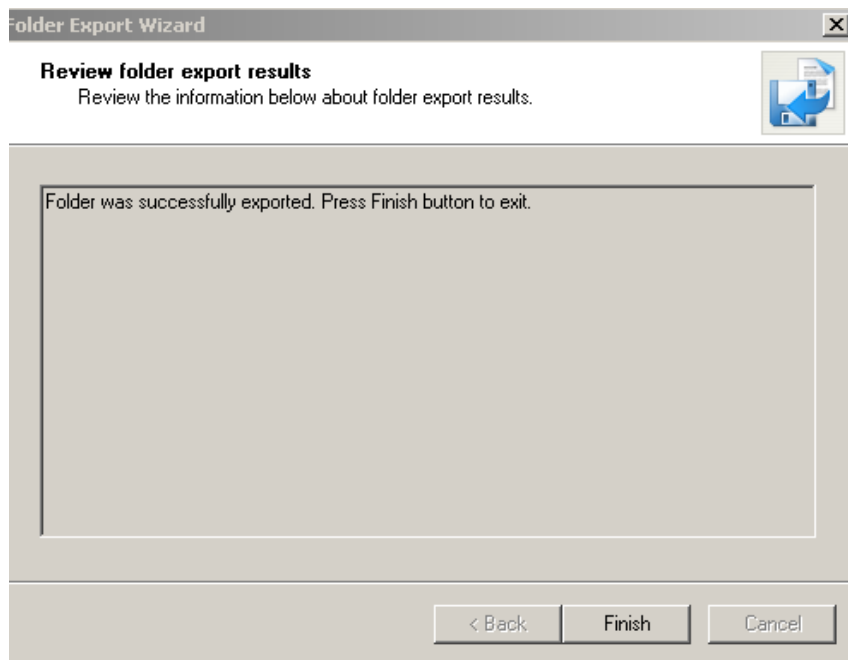
FTP SITE:

The FTP site is used for transferring files. To get to the FTP site, key in <u>ftp://ftp.dot.il.gov/private/d3</u> (copy/paste will not work). Then under "tools" select "Open FTP Site in Windows Explorer".


To log in:

  User name: d3guest
  Password: ch1cKen04 (as of July 3, 2013)
  Check the save password.
  Click Log On.

There are the basic folders in the FTP site. Most projects/files are placed in "District 3 Transfers". Information is dragged and dropped into the correct folder from your S:, P:, etc. drives. **Important:** All information needs to be named correctly. Once information is placed on the FTP site, it cannot be renamed or deleted except by the PW administrator.

All folders are dragged to FTP site -- **NOT CREATED**.

After files are downloaded, they need to be deleted from the FTP site. "File Transfer Protocal" is not a storage site for projects. Send an e-mail to the PW administrator to delete it.
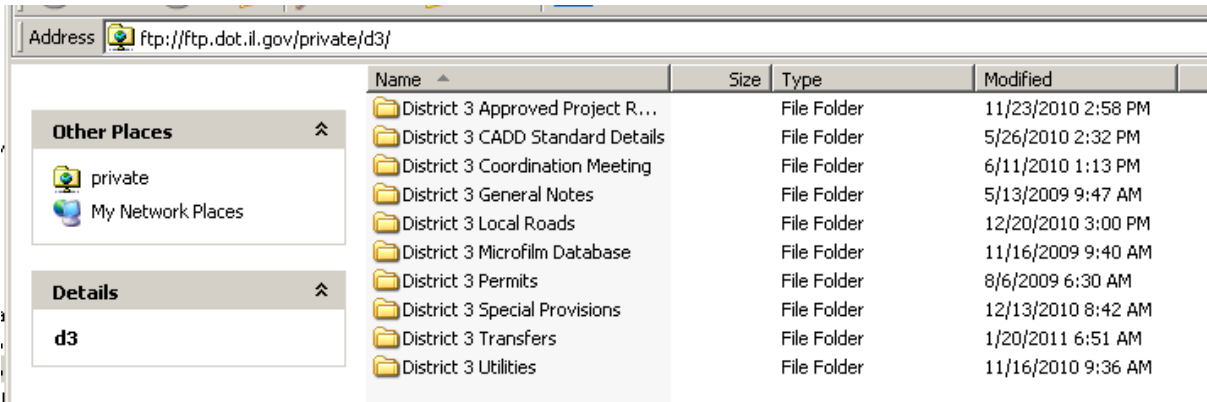
HINTS:

To rearrange file list in any program that has the following heading format, one can click on Name, File Size, Date Modified…… The new order will be from A to Z, click it again to change it Z to A…….
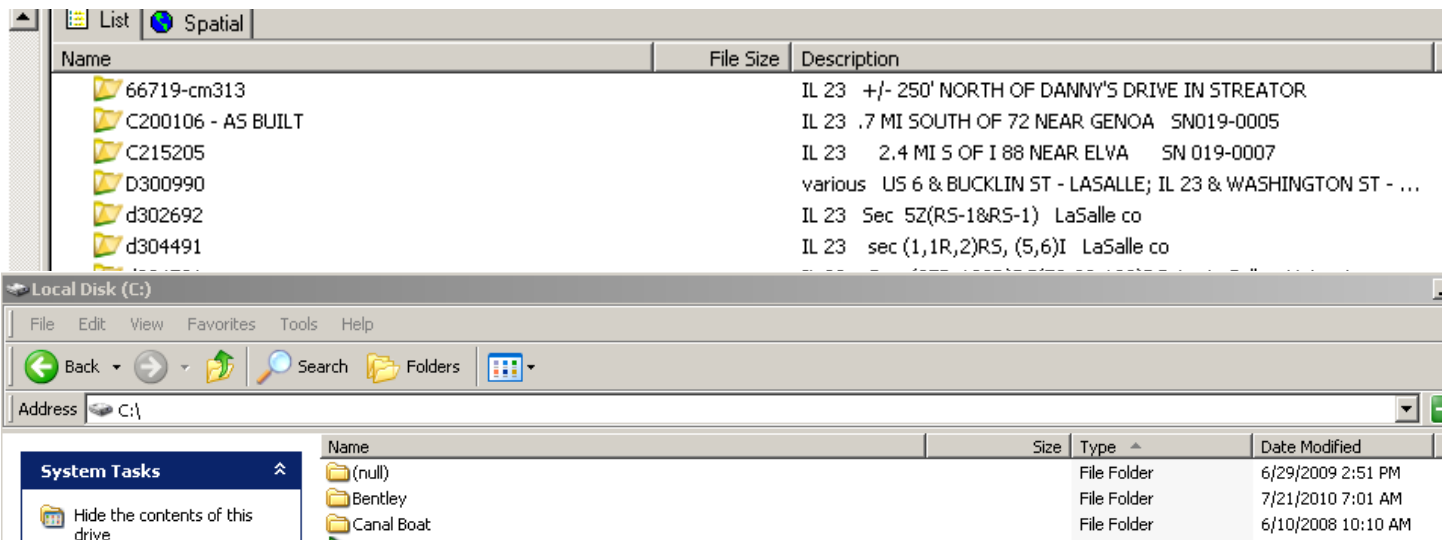
GOOD PRACTICE:

- Look for checked out files before closing PW.

- Reboot Nightly – select Shut Down then select Restart.

If you have any "hints" or "good practices" that you would like to share, let the PW administrator know and it can be added to this Guide.