

# Creating and Attributing Documents and Engineering Data in ProjectWise for the NHHS Program

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The purpose of this document is to provide users general instructions and guidance how to best create and attribute documents using the NHHS Interface in ProjectWise. The primary benefit of adding attributes to documents and engineering data is to enable site specific searches and for legacy data categorization. Not every attribute field has been developed. Due to this, a user defined attribute field is provided to allow custom input as needed.

An overview of all the attributes developed by CTDOT is described on the following website:

[http://www.ct.gov/dot/lib/dot/documents/dstatedesfd/CT\\_DOC\\_PUB\\_CTDOT\\_Categories.xlsx](http://www.ct.gov/dot/lib/dot/documents/dstatedesfd/CT_DOC_PUB_CTDOT_Categories.xlsx)

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## ProjectWise (Thick Client)

### Setting the Correct Interface

Interfaces allow users to capture Document and Engineering Data Attributes (Metadata) that are specific to the NHHS Program. The interface can be viewed and modified by right mouse selecting any data inside ProjectWise and selecting Properties followed by selecting the attributes tab.

In order to use the correct interface for the NHHS Program, switch the interface to CTDOT\_Doc\_Code\_Plus by following step 1 below.

1. Right mouse select the top gray area in ProjectWise Thick Client and select Interface.

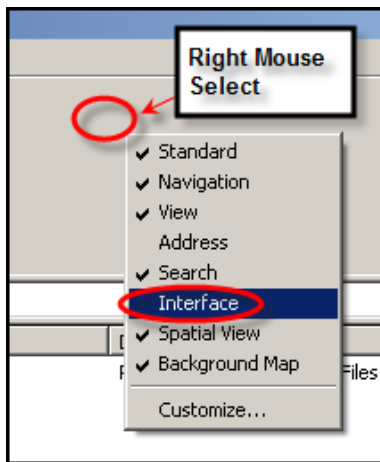


Figure 1

## Customizing your View

It is recommended that users create a custom view that can assist with navigating the attributes more efficiently based on your use of the program. The steps below outline the suggested options for creating views for documents and CAD production.

### Creating a Custom View for Working with Documents

1. In ProjectWise go to View>Manage Views> New followed by giving it a name of NHHS\_Document\_View
2. Select the following suggested Data Categories. Be sure the CTDOT\_Design\_Envir is selected.

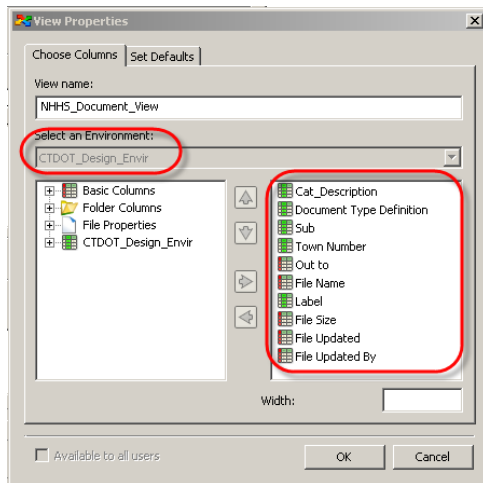


Figure 2

### Creating a Custom View for Working with CAD Files

1. In ProjectWise go to View>Manage Views> New
2. Select the following suggested Data Categories. Be sure the CTDOT\_Design\_Envir is selected.

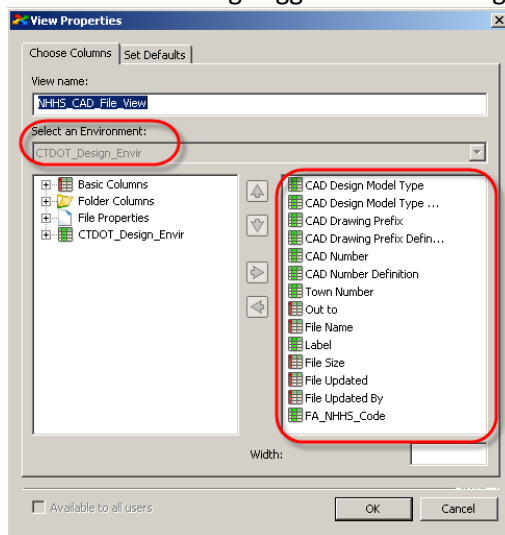


Figure 3

## Assigning Views to Specific Folders

Views can be assigned to specific folders by editing the defaults in View Properties. See Figure 4 below.

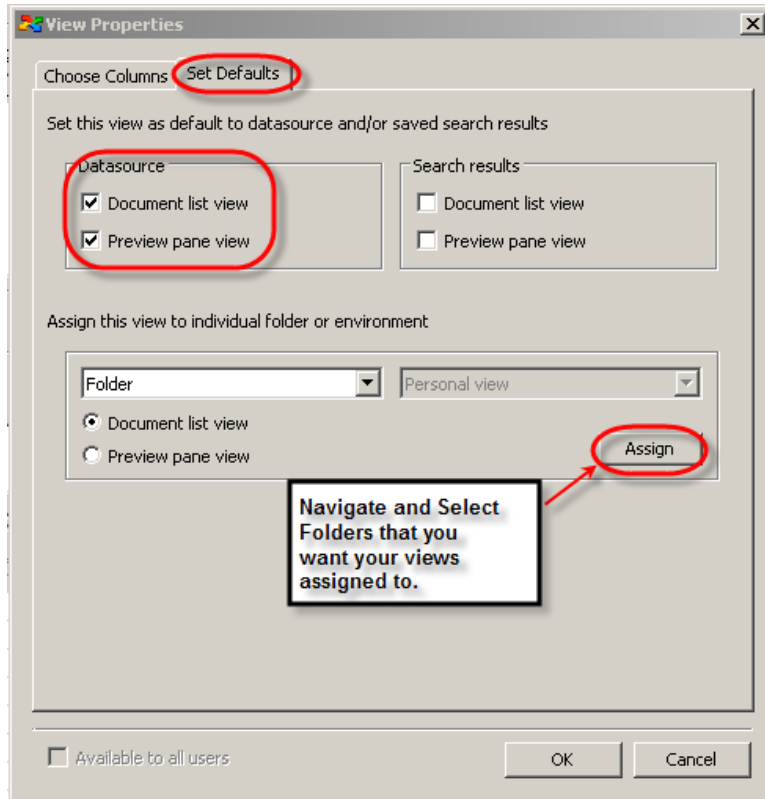


Figure 4

## Creating and Attributing Documents and Engineering Data in ProjectWise

Using thick client, data can be dragged and dropped in ProjectWise using simple windows functions. Determine which folder you are going to add the documents. Set the Advanced Document Creation Wizard. This is typically set in ProjectWise automatically. To verify that the Document's Creation Wizard is set in ProjectWise as your default. Go to Tools > Wizard Manager > Select Advanced Wizard. See Figure 5 and Figure 6 below:

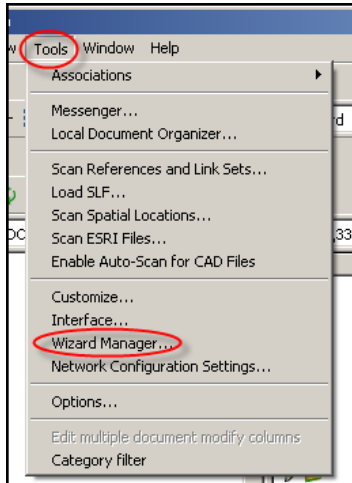


Figure 5

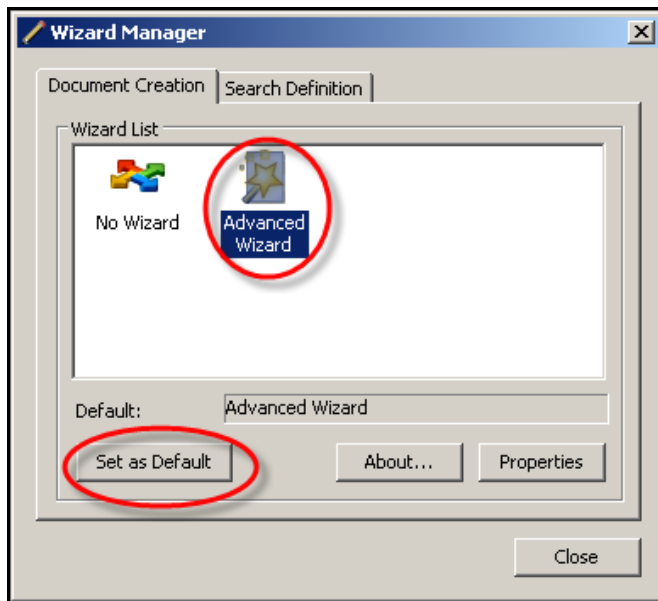


Figure 6

## Document Attributing

For documents, once a “drag and drop” has been initiated, proceed using the following steps:

1. Select the Target Folder via the Advanced Document Creation Wizard as shown in Figure 7.

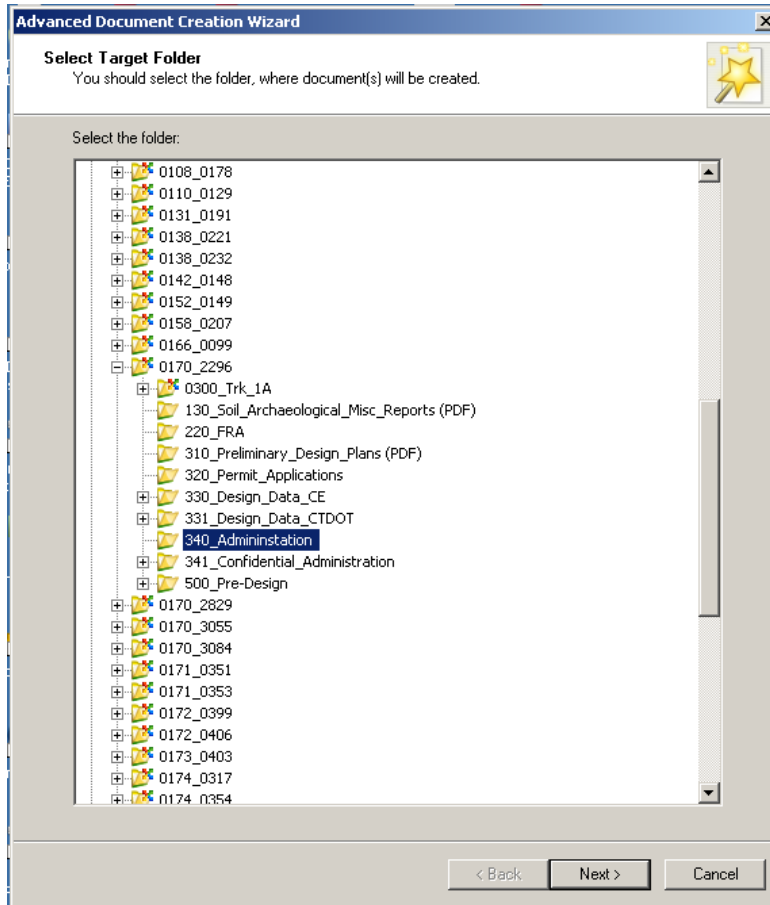


Figure 7

2. Select a Template as shown in Figure 8. This is automatically defaulted to the files that you have decided to drag and drop.

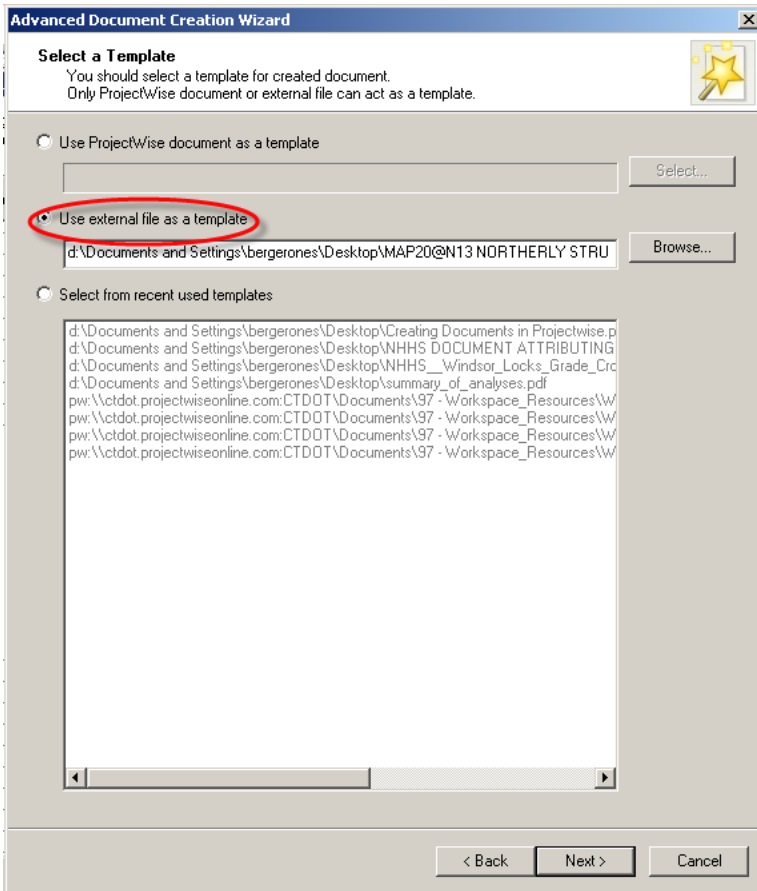


Figure 8

3. Fill out the Attributes required for documents according to Figure 9. Drop downs are required to be filled out for Town and there are now certain Document types that will trigger specific drop downs for the Documentation (DOC) Main Category; and Subcategories for Correspondence (CRS), Miscellaneous (MDO) and Reports (RPT). For a summary spreadsheet containing all CTDOT Attribute Criteria and expanded ones for the NHHS Program go to the following website:

[http://www.ct.gov/dot/lib/dot/documents/dstatedesfd/CT\\_DOC\\_PUB\\_CTDOT\\_Categories.xlsx](http://www.ct.gov/dot/lib/dot/documents/dstatedesfd/CT_DOC_PUB_CTDOT_Categories.xlsx)

4. Enter a User Defined label which best fits the document as shown in the bottom of Figure 9. Typically a date and subject are the most common types of user defined labels.

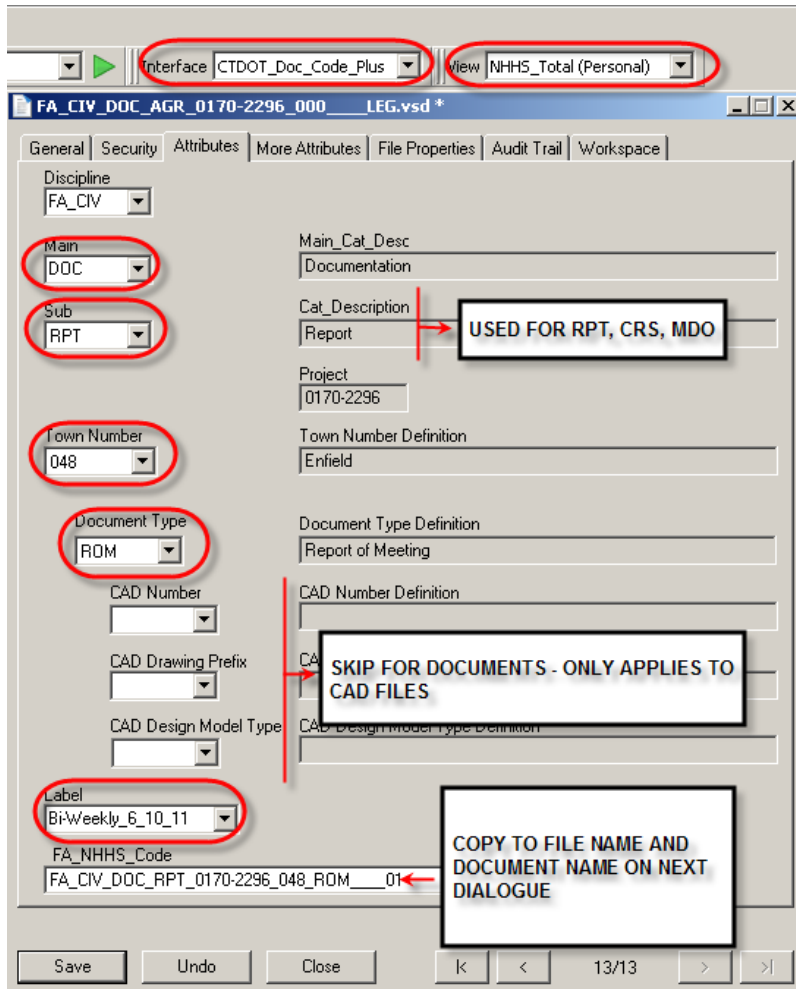


Figure 9

5. Select Next after defining the Document Attributes. Common practice is to copy the FA\_NHHS\_Code at the bottom of the Attribute Interface and insert it as the New Document Name and New Document File Name, and use the label as the Description for the new document in the Document Properties screen. This is depicted in Figure 10. Select Next when complete.



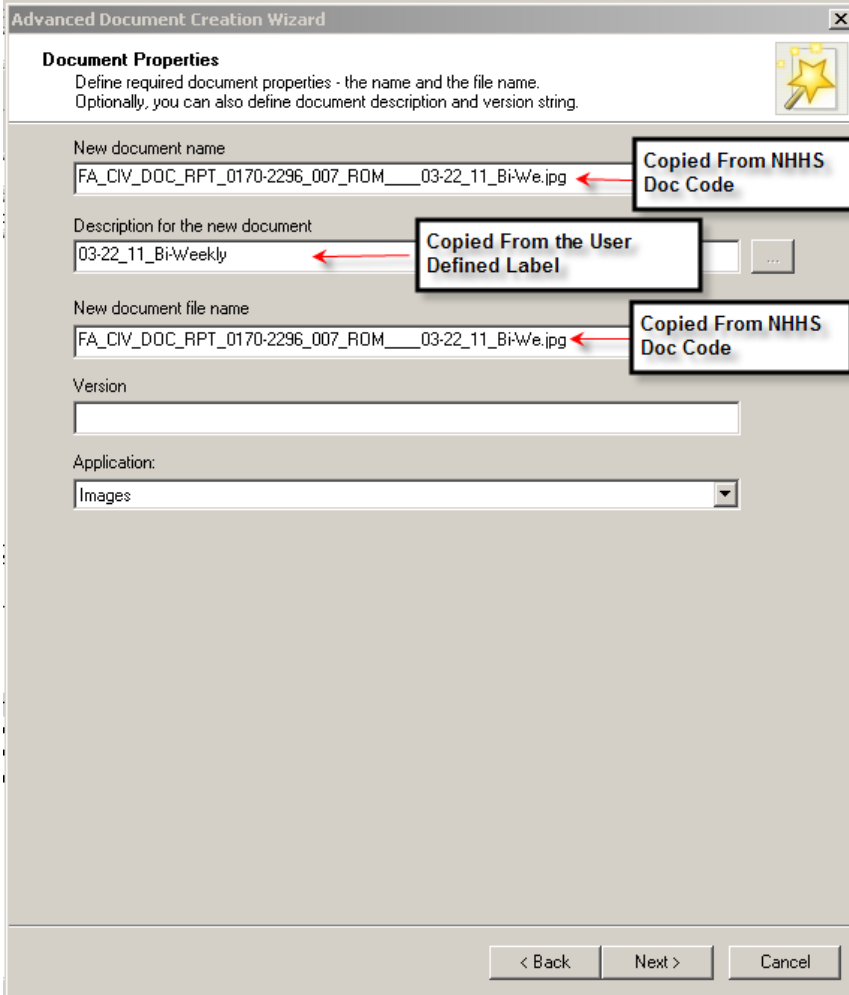


Figure 10

6. The verification screen is next, which allows you to review the attributes and additional information. Once complete, select next and the document will be added to ProjectWise. See Figure 11.

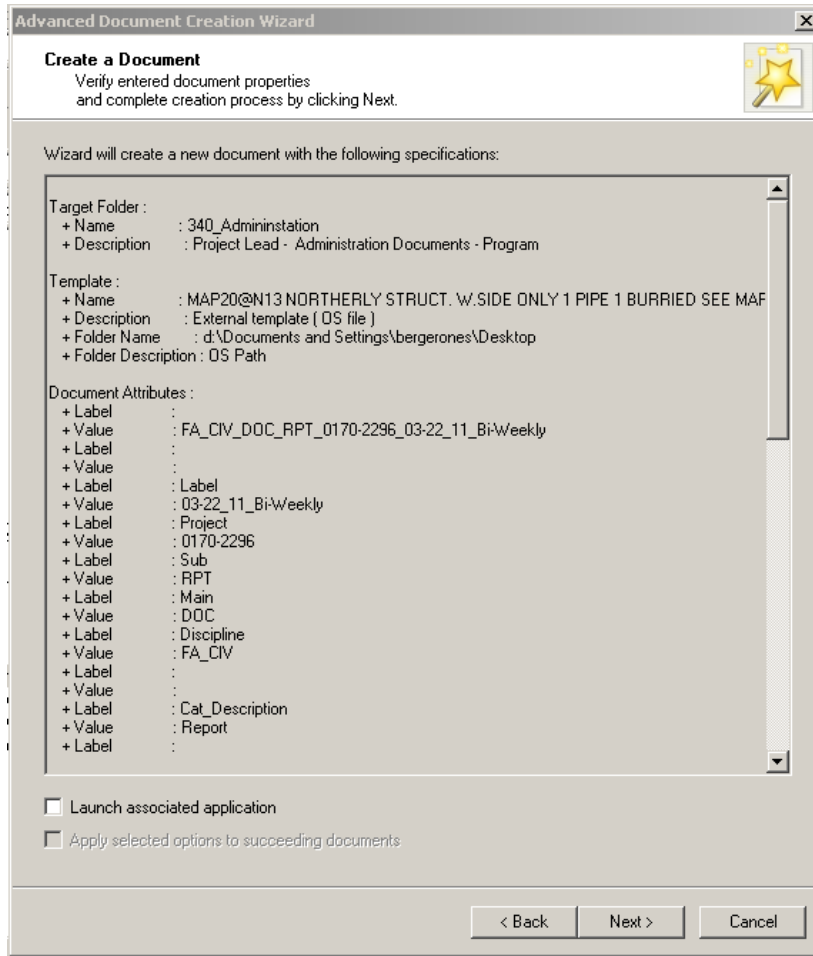


Figure 11

### CAD Cut Sheet Creation and Attributing

New CAD Cut Sheets need to be created and developed within the ProjectWise Environment for the NHHS Program. The following steps outline the procedure required to initiate the document creation wizard for CAD Cut Sheets:

1. Open ProjectWise and initiate the new document creation wizard as shown in Figure 12.

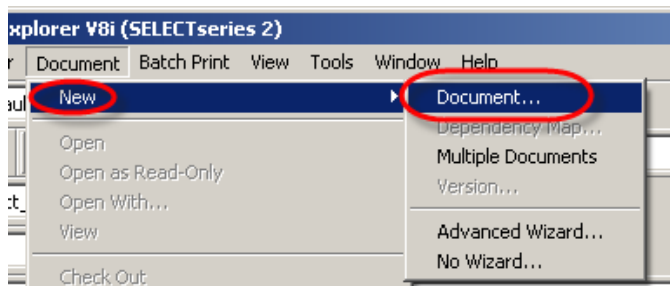


Figure 12

2. Select the folder that you want to create the new document. The folders circled in red below correspond to cut sheet development. See Figure 13 below.

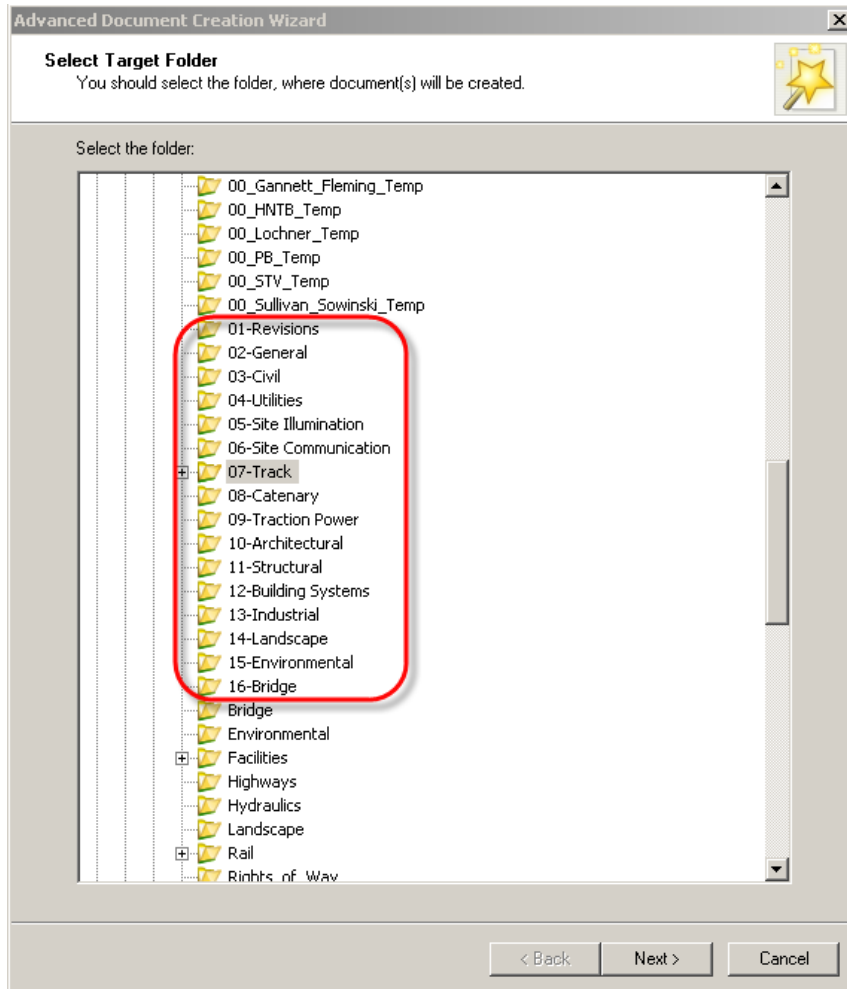


Figure 13

3. Select a template by using a ProjectWise document as a Template (CTDOT seed files). Navigate to the sub-directory shown in Figure 14 and select the necessary sheet template. Select Next when finished.

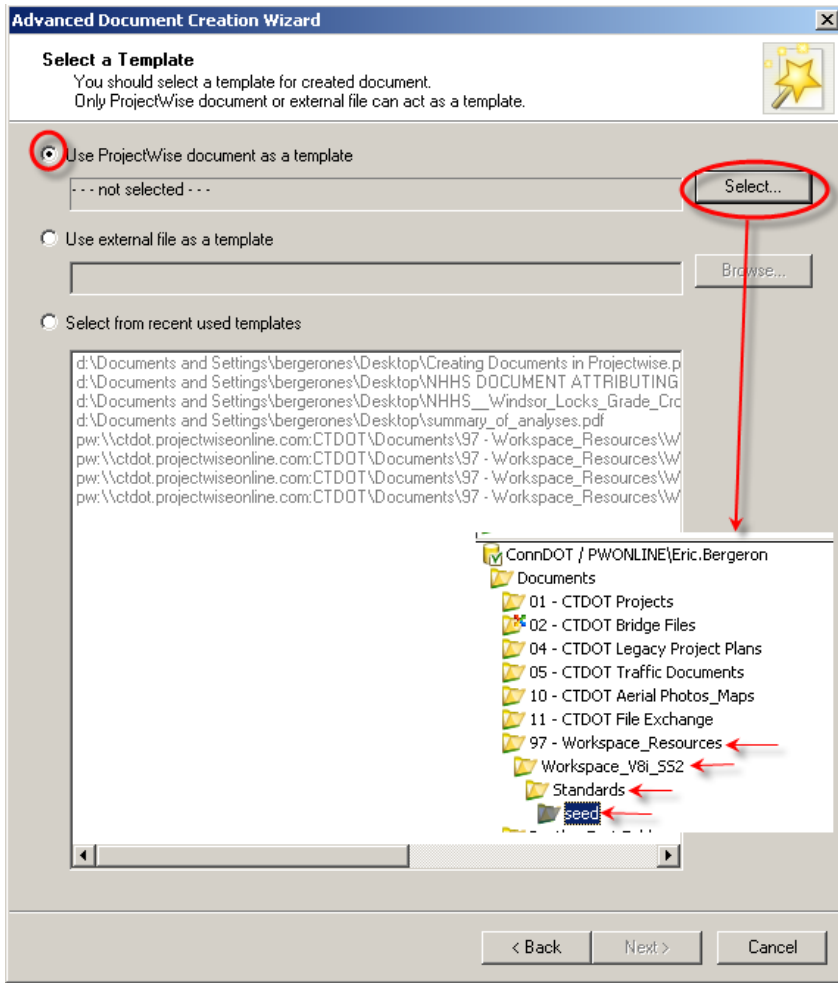


Figure 14

4. Define the necessary Document Attributes as shown in Figure 15 below. Select Next when complete and copy the NHHS Doc Code as the File Name and Document Name in the Document properties dialogue. Similar to the process outlined for documents above.

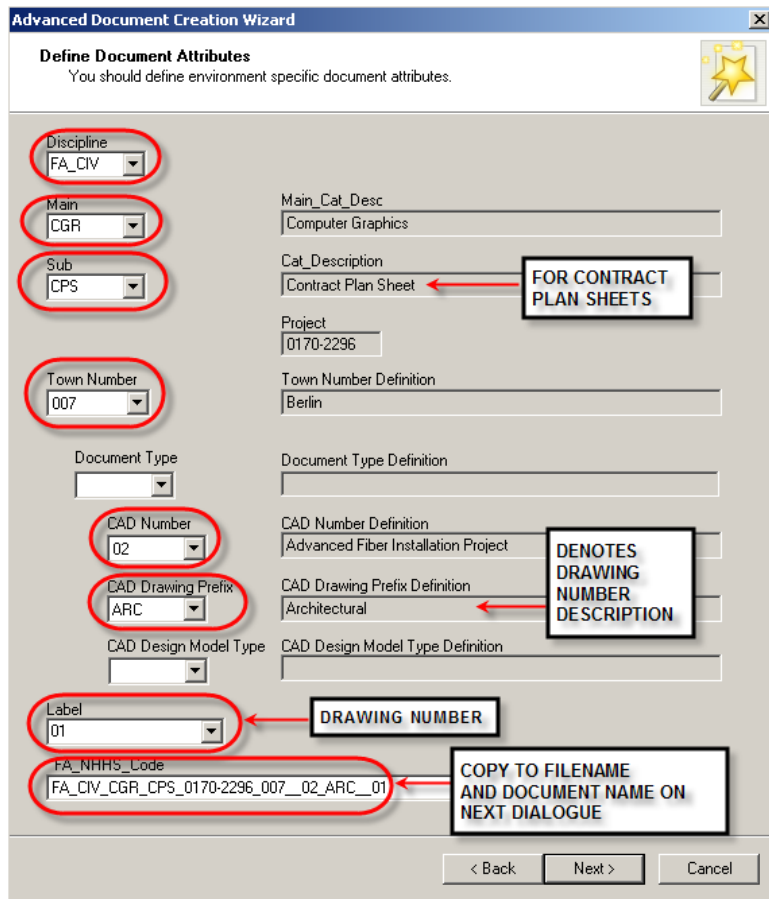


Figure 15

### CAD Design Model Attributing

For CAD Design Models, follow the same process as outlined above for cut sheets, with exception to the following:

- Select a Design Model Seed File within the CTDOT Workspaces folder and save it designated design modeling areas (See Figure 16).
- Define Criteria for Drawing Prefix (Discipline Designator)
- Define Criteria for Design Model Type
- For Models associated with specific Amtrak Structures, also insert a Milepost Designation (i.e. MP21.12) and any other specific descriptive info regarding the model (i.e. WW = Wing Wall, BRS = Bearings, RW = Retaining Wall, FRM = Frame).
- Copy the Label in the Attributes for the new Document Description

See Figure 17 below for what the view of typical attributes looks like.

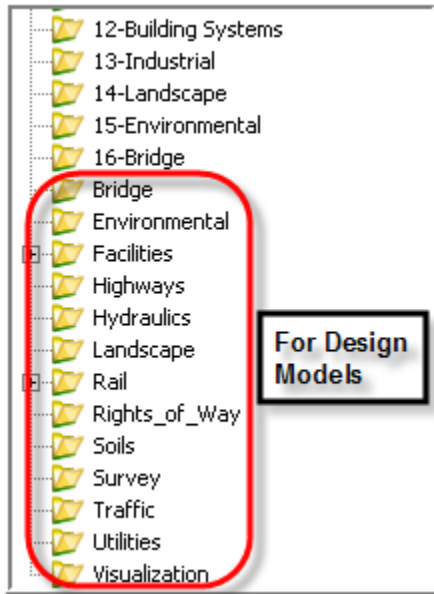


Figure 16

**Advanced Document Creation Wizard**

**Define Document Attributes**  
You should define environment specific document attributes.

Discipline: FA

Main: CGR

Sub: PDM

Town Number: 007

Document Type: [ ]

CAD Number: 02

CAD Drawing Prefix: STR

CAD Design Model Type: DETL

Label: MP21.11\_wvw

FA\_NHHS\_Code: FA\_CGR\_PDM\_0170-2296\_007\_02\_STR\_DETL\_MP21.11\_wvw

Main\_Cat\_Desc: Computer Graphics

Cat\_Description: Proposed Design Model

Project: 0170-2296

Town Number Definition: Berlin

Document Type Definition: [ ]

CAD Number Definition: Advanced Fiber Installation Project

CAD Drawing Prefix Definition: [ ]

CAD Design Model Type Definition: Details

**FOR STRUCTURES  
ENTER AMTRACK  
MILEPOST AND  
DESCRIPTIVE INFO**

< Back   Next >   Cancel

Figure 17

### **Preliminary and Final Contract Submissions**

For information on attributing and transmitting final PDF contract submissions to ProjectWise, refer to AEC Application's Latest Digital Project Development Guide located on the following website:

[http://www.ct.gov/dot/lib/dot/documents/aec/Digital\\_Project\\_Development.pdf](http://www.ct.gov/dot/lib/dot/documents/aec/Digital_Project_Development.pdf)

In the development of Preliminary Submittals, documents should be developed as close to possible as what the recommendations for final contract submittals. For preliminary submissions, digital signatures do not need to be utilized.

## ProjectWise (Thin Client)

### General Document Attributing

Open Windows Explorer and Navigate to the ProjectWise Website:

<https://ctdot.projectwiseonline.com>. Once you're in the site, navigate to your designated project folder and go to ProjectWise Content located on the right side of the screen. Then assure the proper interface is selected as shown in Figure 18.

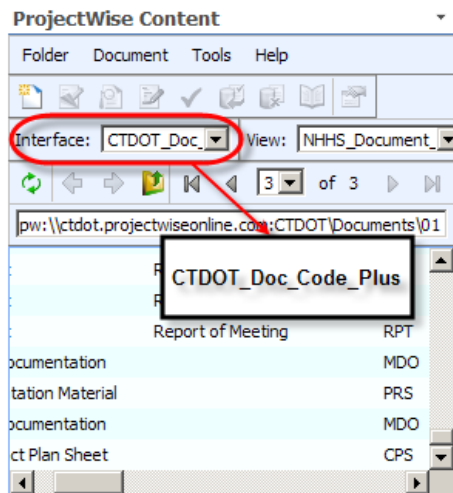


Figure 18

Begin the new document creation by Selecting Document > New, as shown in Figure 19.

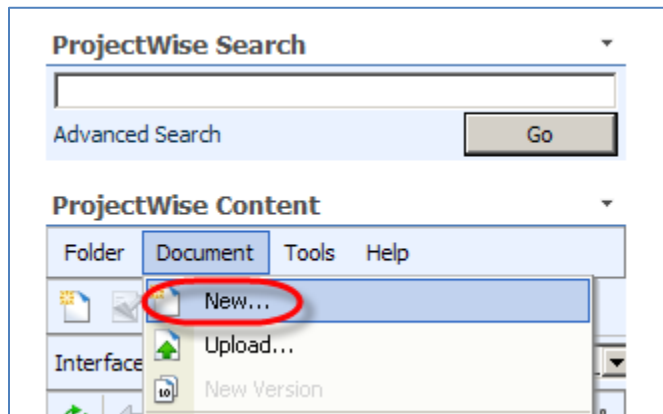


Figure 19

Fill out the below attribute screen (Figure 20) and follow the guidance as described for the Thick client for Document Attributing, CAD Cut Sheet Creation and Attributing and CAD Design Model Attributing. Select Save when complete.



https://ctdot.projectwiseonline.com/?Control=Bentley.EC.Web.ProjectWise.UI.WebContr...

New Document

Document

Document Name: FA\_CIV\_CGR\_CPS\_0170-2296\_079\_02\_TSH\_01.dgn

Document Description: 01.dgn

Application: <none>

Department: <none>

File

File: d:\Documents and Settings\bergerones\Desktop\170\_2296\_SHEET20\_NEV Browse...

File Name: FA\_CIV\_CGR\_CPS\_0170-2296\_079\_02\_TSH\_01.dgn

Attributes

Discipline: FA\_CIV

Main: CGR

Sub: CPS

Town Number: 079

Document Type: [ ]

CAD Number: 02

CAD Drawing Prefix: TSH

CAD Design Model Type: [ ]

Label: 01

FA\_NHHS\_Code: FA\_CIV\_CGR\_CPS\_0170-2296\_079\_02\_TSH\_01

Main\_Cat\_Desc: [ ]

Cat\_Description: [ ]

Project: 0170-2296

Town Number Definition: [ ]

Document Type Definition: [ ]

CAD Number Definition: [ ]

CAD Drawing Prefix Definition: [ ]

CAD Design Model Type Definition: [ ]

Copy Code to Document Name and Filename

Save Cancel

Figure 20