Brown and Caldwell is using ProjectWise to manage project documents. This document outlines the method to use basic workflows with ProjectWise that provides simplicity, consistency, efficiency and scalability to assisting in sharing work between different locations. Adherence to the workflow described below will help you be successful in delivering your projects on budget and on time.

Summary

There are several methods that can be used to create or place documents in the project folders. You can use an existing document, a template document in ProjectWise or no document; which is meta data to a file but no actual file. This document outlines each method to create a document in ProjectWise.

Create a Document – Dragging into ProjectWise

There are a few ways of creating documents.

1. You can copy an existing file from the Windows environment ProjectWise datasource by dragging and dropping.
2. You can select New Document in ProjectWise similar to creating a new document in Windows Explorer.
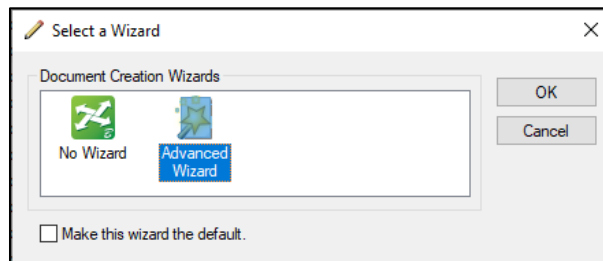
3. It is recommended to create documents via **Advanced Wizard:** Here are the step-by-step instruction for the Advanced Wizard: Copying existing documents from desktop/server into ProjectWise.

1. Drag an existing file(s) into the desired folder in ProjectWise. In this case we will be using the "02a Change Log" folder as the desired location.
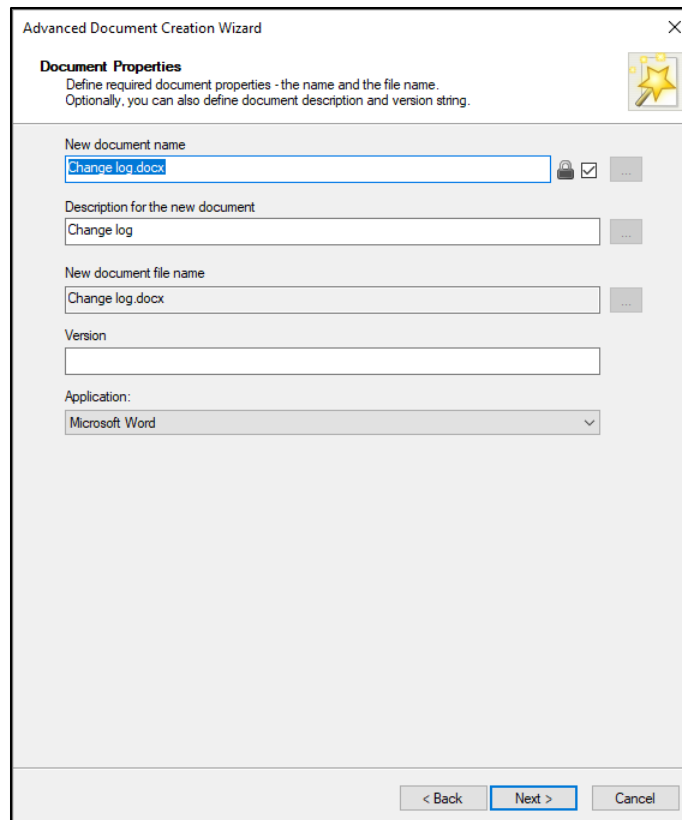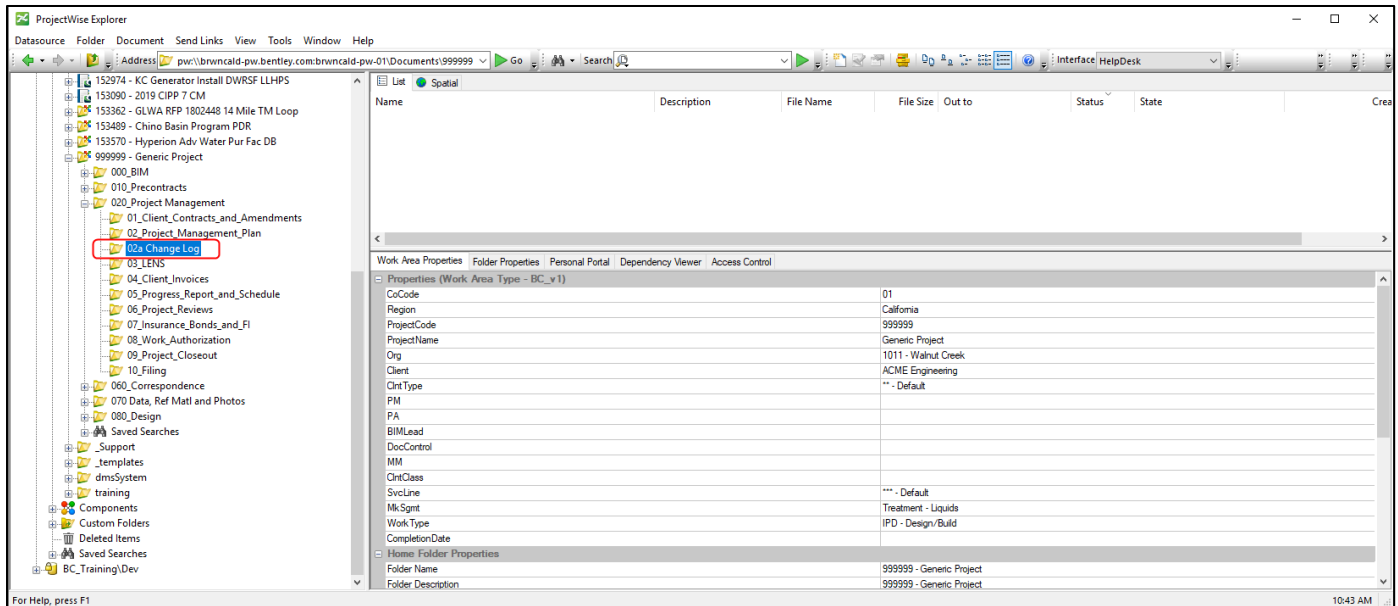
The Advanced Document Creation Wizard window will appear and contain information about the document being placed into ProjectWise.

      a. New Document Name – Name of the new document

      b. Description - Description for the new document

      c. New Document file name – This name should match the New document name above.

      d. Version – if your Manager does not want to delete file and wants to create versions then each vile will need to be versioned. Please double check with your Manager.

      e. Application – Application that the file will open with once in ProjectWise.

Still having trouble?
Internal Users: Create a ticket from the BC Help Desk. Select "Design Technology" as the queue and "ProjectWise" as the category to ensure fastest routing of your request.
**External Users**: Contact your Project Manager

Document names should **NOT** Contain special characters such as `` `~!@#$%^&*()_+{}[];":'<>?/ `` Description of the document can contain special characters.

2. When the Define Document Attributes page opens, optionally enter the values in the attribute fields and click Next. These attributes will appear on the Attributes tab of the Document Properties dialog box. Properly filling out the attributes will help other users identify files and find them with the ProjectWise search function.
3. When the Document Properties page opens, enter new or edit existing values for the document name, description, file name, and version. All documents must have a unique document name, a description, and a unique file name within that folder. Properly filling out the description of the new file will help other users identify files and find them with the ProjectWise search function.
4. Once you have imported the document from disk, make sure it is in ProjectWise and remove the local copy. You do not want the same document residing in two places as that has potential to cause confusion and version conflicts

## Create a Document – Using Advanced Document Creation

1. To create a new document using the Advanced Document Creation Wizard Right click in the Documents area, select New Document.
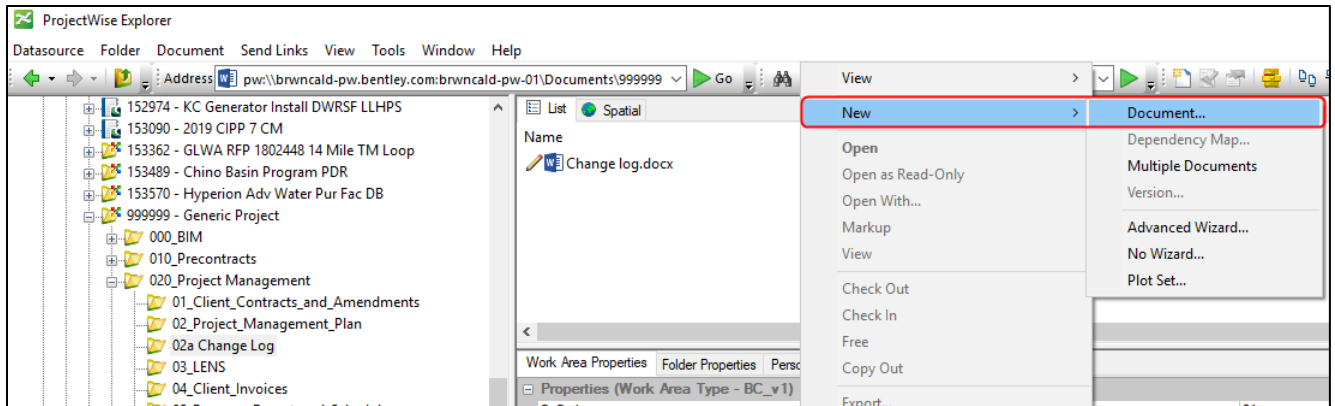
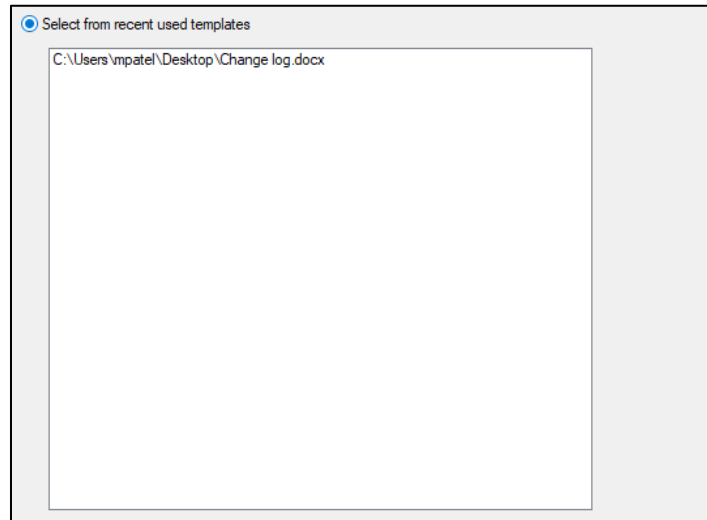2. The Advanced Document Creation Wizard window will display.
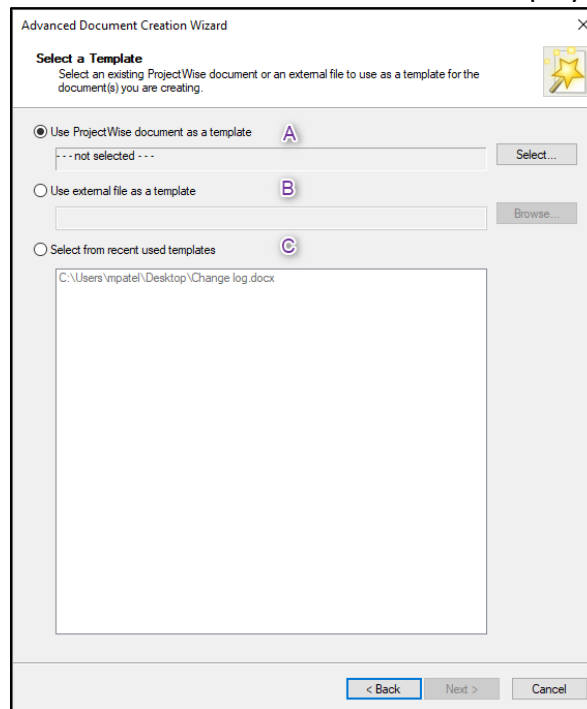
   a. To create a new document based on an existing ProjectWise document, turn on "Use ProjectWise document as a template," click Select, and select a document from the Select Template Document dialog box. If you are dragging an existing ProjectWise document from one folder to another, this option and the document you are dragging over will be selected by default.
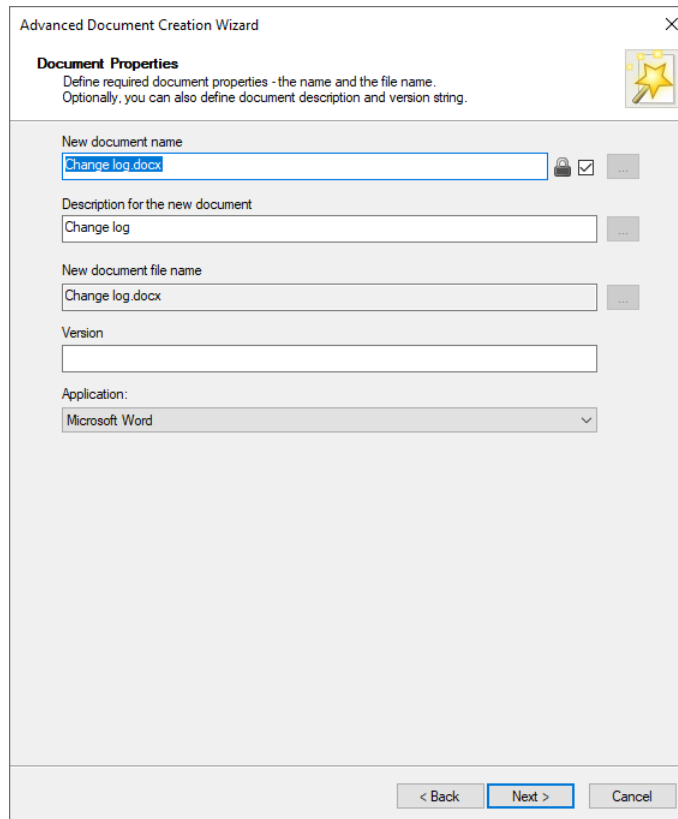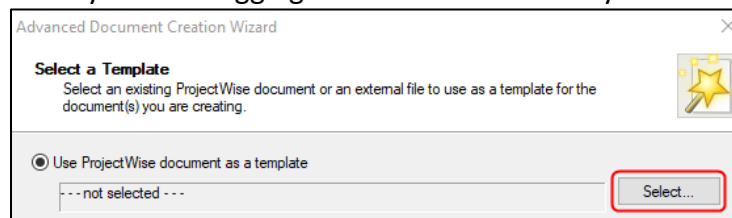
b. To create a new document based on a file not currently stored in ProjectWise, turn on "Use external file as a template," click Browse, and select the external file to use as your seed file.

c. To create a new document by using a file or document that has already been used by the wizard to create a new document, turn on "Select from recent used templates" and select the file or document to use from the list box. This option is disabled if this is the first time using the wizard. As documents are created using the wizard the selection list will grow.

3. The Advanced Document Creation Wizard window will display, and information can be entered as needed.

4. Selecting Next will Create the document in the folder.
5. The method that is preferred is creating documents via the Advanced Wizard. It allows users to create documents with all necessary requirements and fill in all attribute information you need to.

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External Users: Contact your Project Manager