



South Carolina
Department of Transportation

Edition

2

SCDOT

Information Technology Services
Engineering Technology & Research Office

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**ProjectWise Professional Services,
Design Build and Rights of Way Templates
Electronic Submission and Retrieval Guide**

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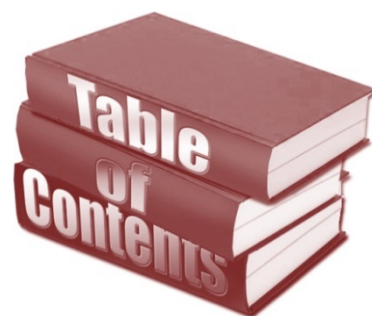
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PROJECTWISE OVERVIEW

What is ProjectWise?

ProjectWise is a project collaboration and AECO information management software developed explicitly for the design and construction of architecture, engineering, construction, and operations (AECO) of infrastructure projects.

ProjectWise (PW) is designed to house and organize all project related documents, including but not limited to MicroStation design files, Geopak files, all Microsoft Office documents, PDFs, text files, images, etc. Users can store any document type within ProjectWise and configure ProjectWise to launch a specific application for each document type.



How is ProjectWise Beneficial to Users?

ProjectWise is collaboration software, therefore users have access to working project documents based on their security privileges, even if they are off-site. Users will no longer have to extensively search for documents or be concerned with the document being the most current version. ProjectWise has a robust search engine which allows users to search by document attributes or key words within a file using the full-text search capability.

Users will no longer have to be concerned with unauthorized access to their documents. ProjectWise is configured to only allow individuals who have the appropriate security privileges to access documents.

Also, ProjectWise has an in-depth audit trail that tracks all activity within the system; to include logging in/out of the system, checking document in/out, exporting/importing documents, viewing documents, copying/deleting/modifying documents, and allows for customized audit reports.



ELECTRONIC SUBMISSION AND RETRIEVAL GUIDE OBJECTIVE

SCDOT is currently using ProjectWise to manage electronic submission and retrieval of proposals, templates and project documents from engineering firms and contractors. SCDOT's future goal is to fully utilize ProjectWise to store and backup project documents, share data across project teams to include primary consultants no matter where they are located, and provide SCDOT project managers with additional tools to manage their engineering projects.

SCDOT looks forward to using the ProjectWise system to connect SCDOT employees, engineering firms and transportation project information. ProjectWise technology will improve the quality of work, save all parties time, help ensure project deadlines are met, and will reduce project cost.



Objective

The objective of this document is to assist with the installation of the **ProjectWise V8i Web Parts Client** and to demonstrate the SCDOT **Professional Services**, **Design Build** and Rights of Way Template electronic submittal and retrieval process through the *ProjectWise V8i Web Parts Client*.

The *ProjectWise V8i Web Parts Client* allows a primary consultant to create, edit, check in/check out, and delete documents within ProjectWise based on the user's access privileges.

The *ProjectWise V8i Web Parts Client* is an internet based client that requires the use of **Internet Explorer (IE) 8 or later (32-bit only)**. It also requires the installation of an *Active X control* for file transfers. ProjectWise can also be used with *iPad - Safari on iOS5.x**.

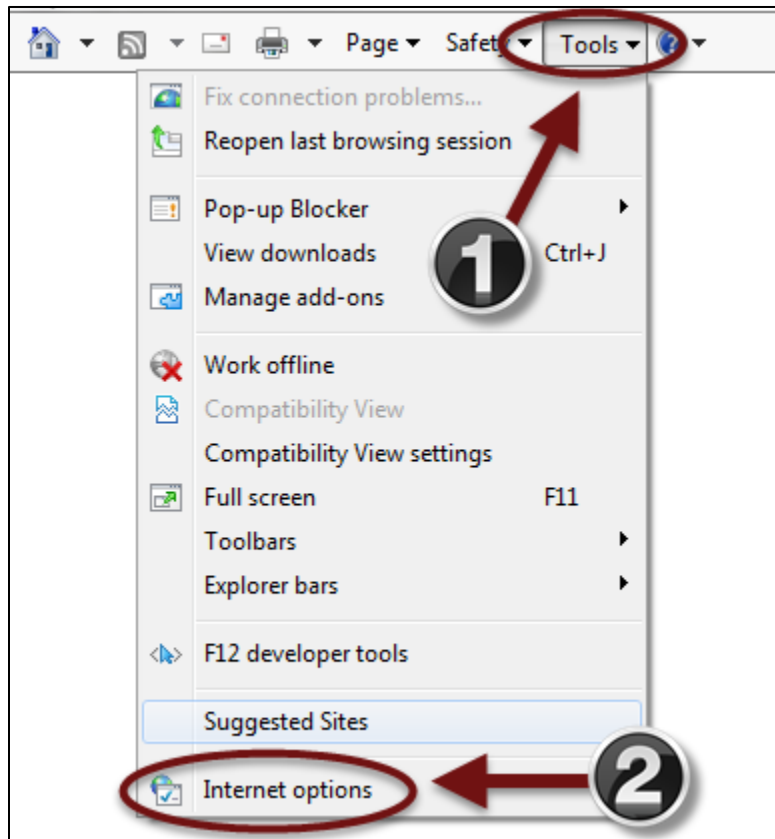
PROJECTWISE V8I WEB PARTS CLIENT INSTALLATION

NOTE: Please make sure to have the **ProjectWise Electronic Submission and Retrieval Guide** available in either electronic or hardcopy format to assist with configuring and logging onto the ProjectWise application for the first time. **Administrative privileges** are required to install the Internet Explorer (IE) web browser ActiveX control.

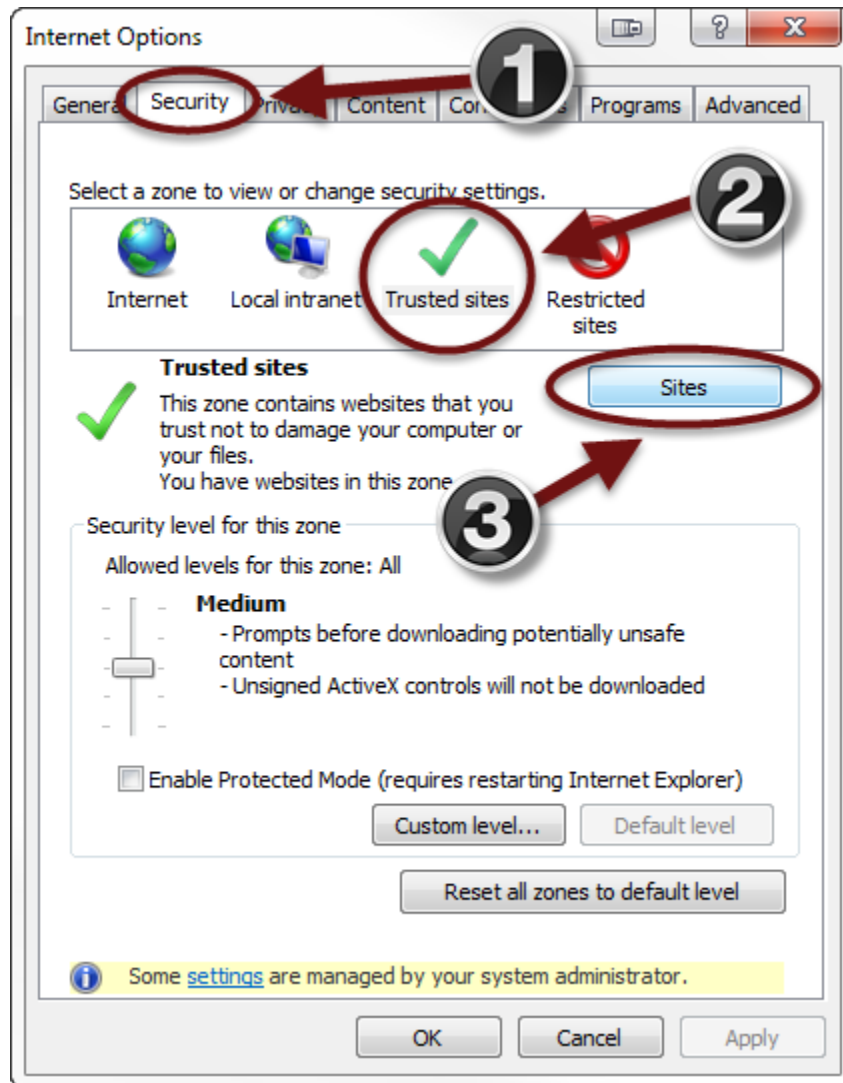
(1). Setting SCDOT's site as a Trusted Site

The software this site utilizes is called *ProjectWise* by Bentley Systems. ProjectWise requires a trusted site to provide an extra layer of security for end users. SCDOT can provide additional details if requested.

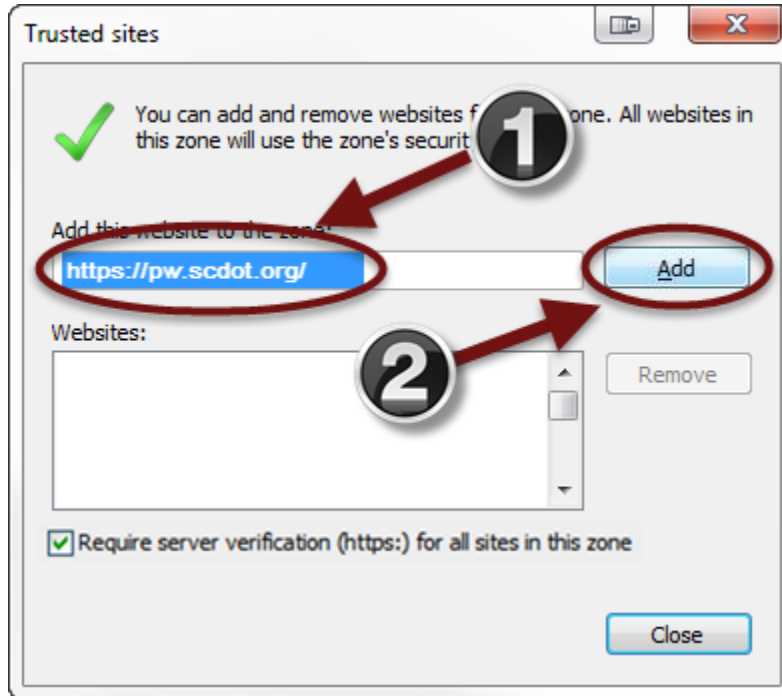
- a. Open the **Internet Explorer (IE) web browser** on your computer. (*This application requires Microsoft IE 8.0 or higher, 32-bit only to function properly*)
 1. Click on the **"Tools"** button from the (IE) command bar.
 2. Then select **"Internet Options"** from the bottom of the dropdown menu.



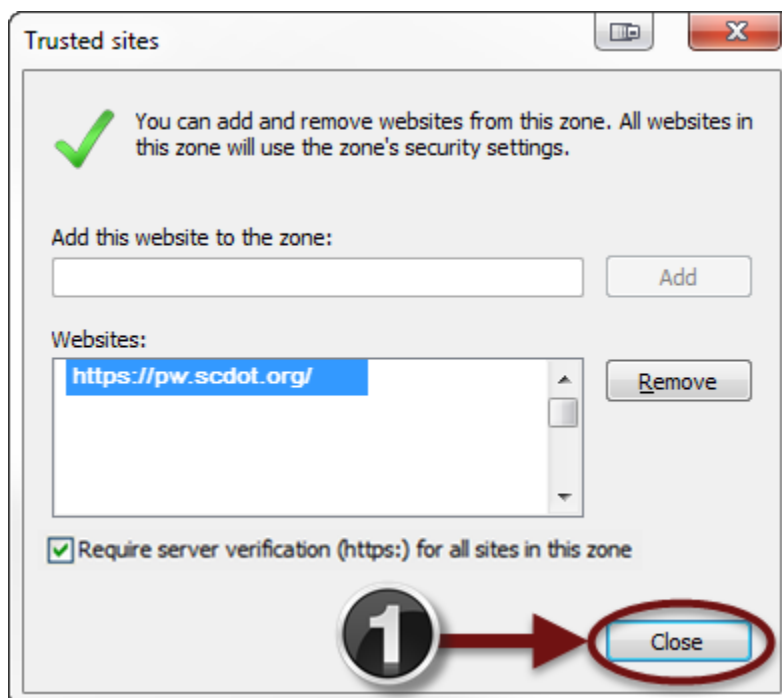
- b. The “Internet Options” dialog box will appear on the screen.
1. Select the “Security” tab from the *Internet Options* dialog box.
 2. Click on the “Trusted sites” icon from the “Select a zone to view or change settings.”
 3. Then click on the “Sites” button.



- c. The “Trusted sites” dialog box will appear on the screen.
 - 1. Enter “<https://pw.scdot.org/>” in the “Add this website to the zone:” field.
 - 2. Then Click on the “Add” button after you enter the address from above.



- d. The address you entered will be added to the “Websites:” area.
 - 1. Click on “Close” to exit the dialog box.



(2). Accessing the ProjectWise V8i Web Parts Client for the First Time

a. Click on the address bar in the (IE) web browser.

1. Enter "<https://pw.scdot.org/>" into the address bar to access the ProjectWise V8i Web Parts Client.

NOTE: Users may also want to bookmark this site as a favorite in (IE).



b. The "ProjectWise Web Client" login dialog box will appear in the center of the web browser.

1. Make sure that "SCDOT" is selected from the "Location:" drop down menu.



- c. Make sure to have the **account login information** that was provided to you by email from SCDOT available in either electronic or hardcopy format to assist you in logging onto the ProjectWise application.
1. Enter the user *name* and *password* provided into the “**User Name:**” and “**Password:**” fields.
 2. Then click the “**Login**” button.

NOTE: Users can copy and paste the username and password from the account login information email into the appropriate fields.



d. When users login into the SCDOT ProjectWise V8i Web Parts Client Internet Application for the first time, users will be prompted with the following “Internet Explorer – Security Warning” message.

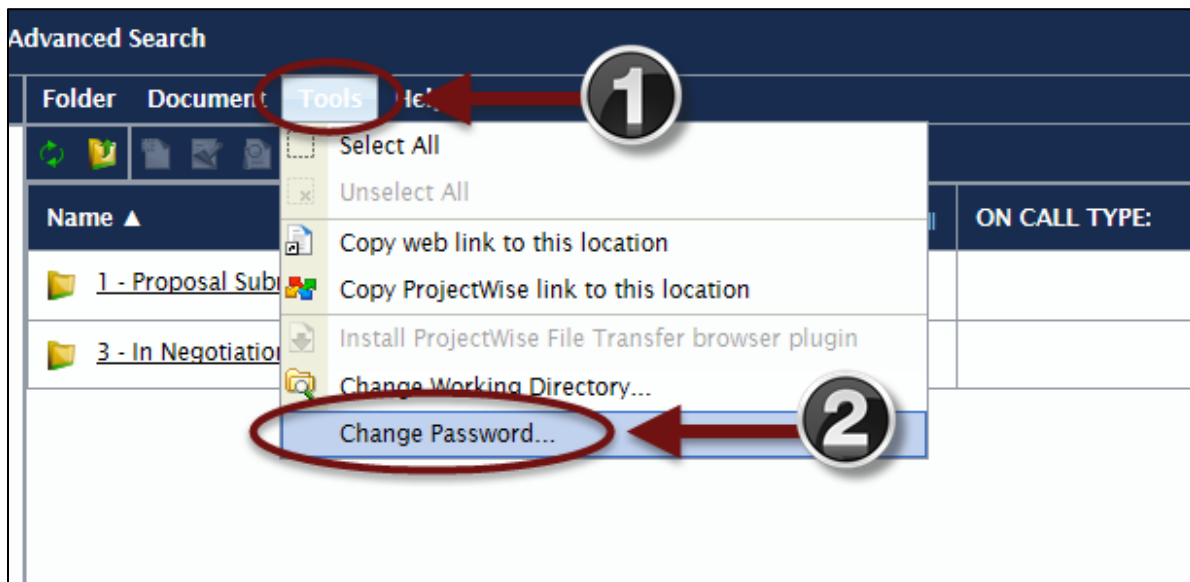
1. Select “Always install software from Bentley Systems, Incorporated”
2. Then click on the “Install” button.

NOTE: Please make sure that your (IE) web browser is set to allow pop-up windows.



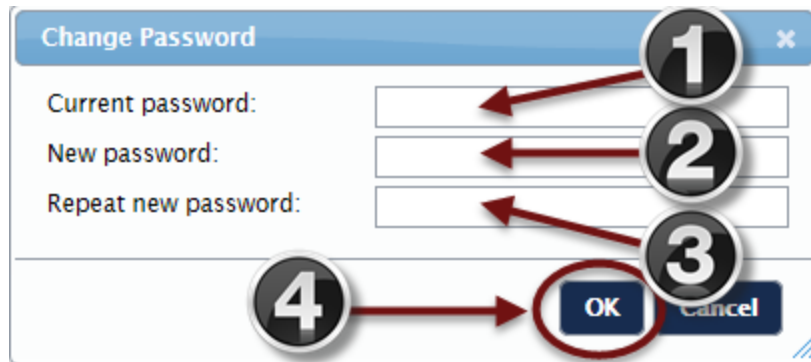
e. You are required to **change your password** used to logon into the SCDOT ProjectWise V8i Web Parts Client Internet Application.

1. Click on the “Tools” button from the ProjectWise application’s menu bar.
2. Then click on “Change Password” from the bottom of the dropdown menu.

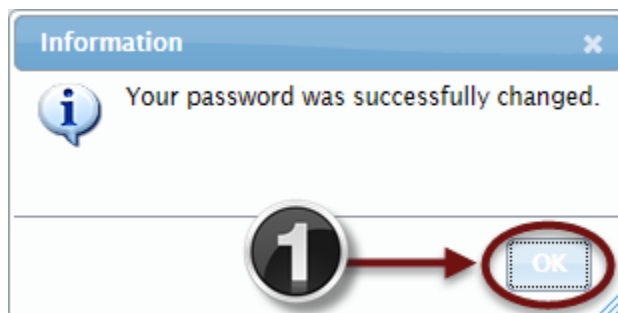


- f. The “Change Password Dialog” box will appear on the screen.
 1. Enter the same password used to log onto the application which was provided in the email by SCDOT into the “Current password:” field.
 2. Enter a *new password* into the “New password:” field.
 3. Then enter the *new password* again into the “Repeat new password:” field.
 4. Then click the “OK” button.

NOTE: Users are required to create a password that is at least **8 characters long** with at least **one capital letter, one lower case letter, and either a number or special character**.



- g. A dialog box will appear stating that “Your password has successfully changed.”
 1. Click on “OK” to complete changing the password and to start using the SCDOT ProjectWise V8i Web Parts Client Internet Application.



PROFESSIONAL SERVICES ELECTRONIC SUBMISSION

(1). Document Naming Convention

Consultants are required to use the document naming convention below to name their **Professional Services** documents before uploading them into the Professional Services Solicitations folder. The **PIN number** is listed in the *South Carolina Business Opportunities (SCBO)* ad under the title of the Professional Services solicitation.

Example: PIN_ConsultantName.extension **(Example: S-XXX-SS_XYZ.pdf)**

(2). Accessing the SCDOT ProjectWise Web Parts Client Website

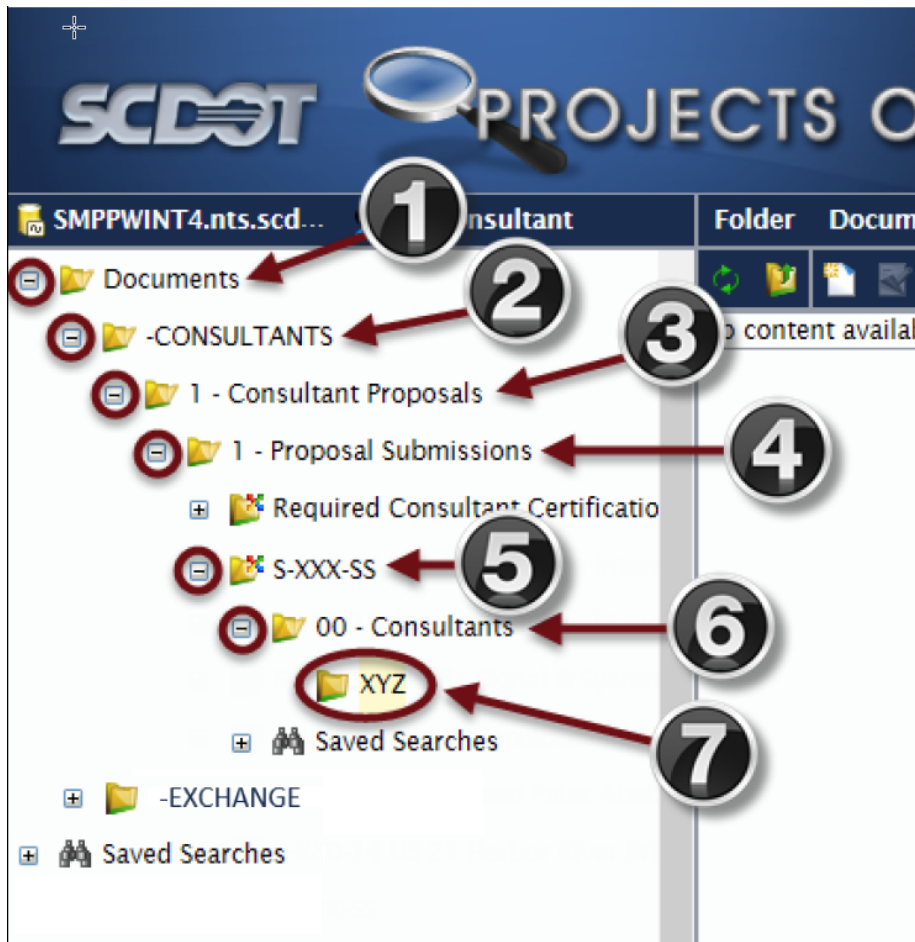
- a. Consultants will use the ProjectWise Web Parts Client to upload their documents by accessing <https://pw.scdot.org/>.

NOTE: It is **important** to follow the **ProjectWise V8i Web Parts Client Installation** section's instructions first to configure ProjectWise so users will be able to utilize the system.

1. Make sure that "SCDOT" is selected from the "Location:" drop down menu.
2. Enter the user name and password into the "User Name:" and "Password:" fields.
3. Then click the "Login" button.

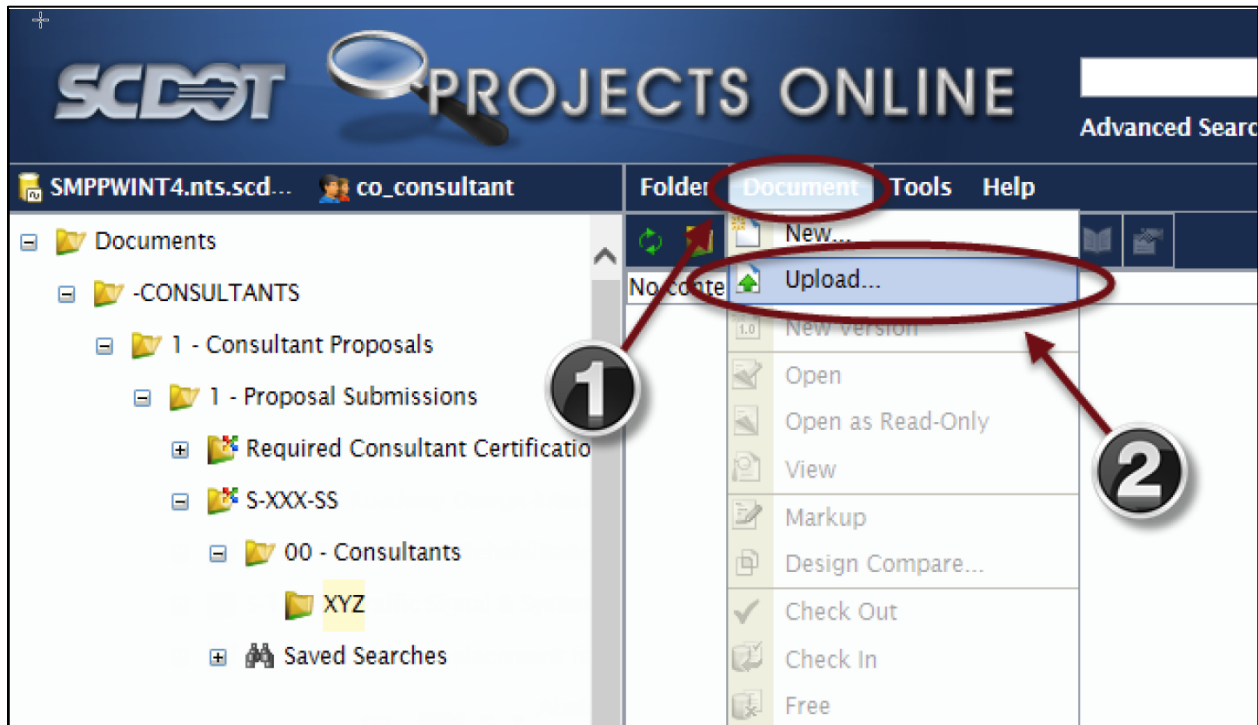


- b. After logging into ProjectWise, “Documents” will appear on the top-left of the tree pane.
1. Expand the “Documents” folder from the *navigation tree* by clicking on the “+” sign beside the folder.
 2. Expand the “-CONSULTANTS” folder by clicking on the “+” sign beside the folder.
 3. Expand the “1 – Consultant Proposals” folder by clicking on the “+” sign beside the folder.
 4. Expand the “1 – Proposal Submissions” folder by clicking on the “+” sign beside the folder.
 5. Expand the project (Example Project Name: “S-XXX-SS”) by clicking on the “+” sign beside the project.
 6. Expand the “00 – Consultants” folder to see the consultant folder (Example: “XYZ”) by clicking on the “+” sign beside the folder.
 7. Select the consultant folder (Example: “XYZ”).



(3). Uploading a Document

- a. With the consultant folder (**Example: “XYZ”**) selected, a document can be uploaded into the folder.
 1. Click on the **“Document”** dropdown from the menu.
 2. Then click the **“Upload”** option from the dropdown.

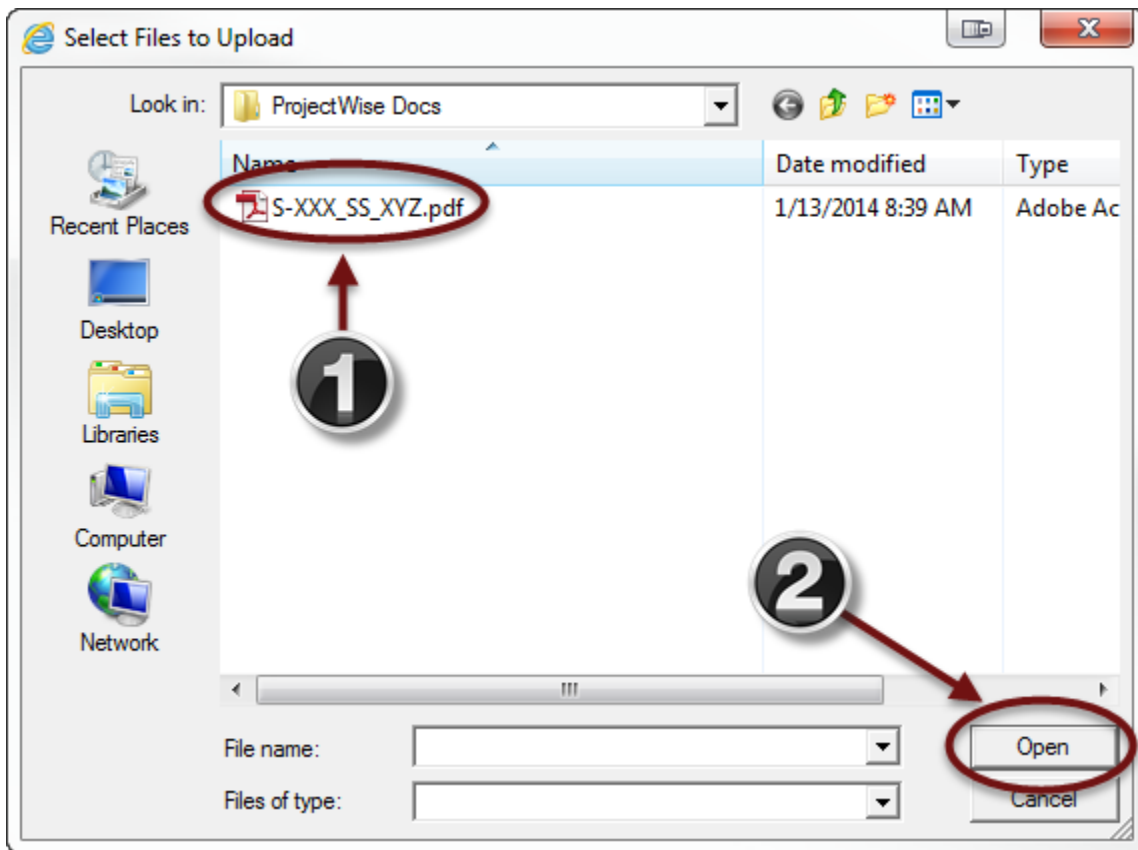


b. The “Select Files to Upload” dialog box will appear.

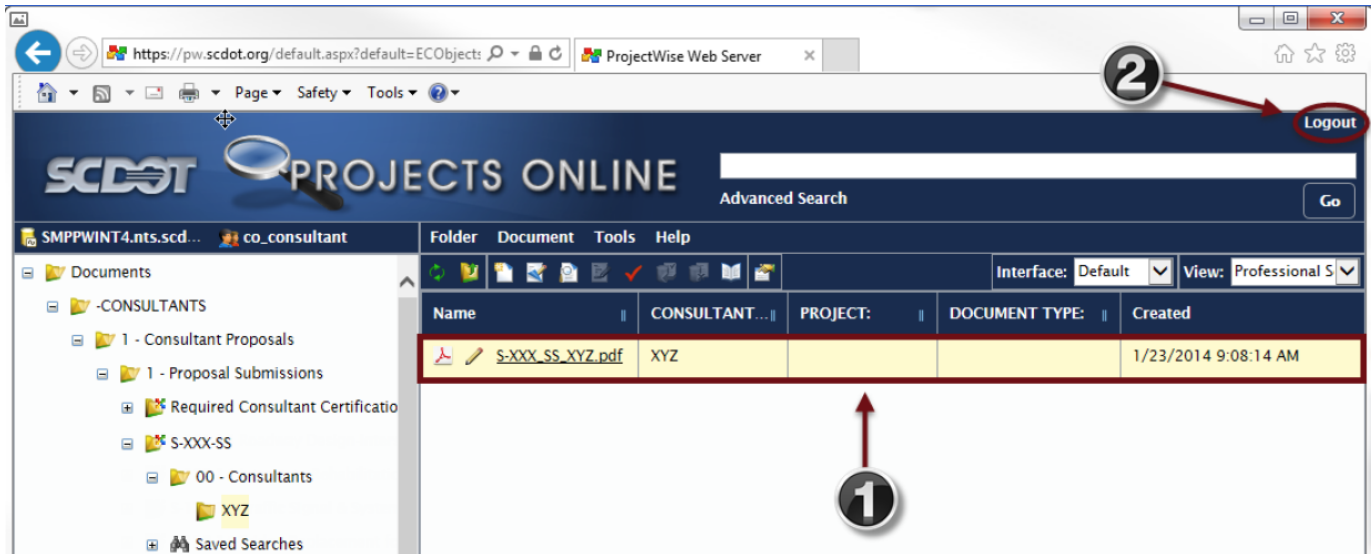
1. Navigate to the desired document and select it.
2. Click the “Open” button on the “Select Files to Upload” dialog box.

NOTE: Use the [Document Naming Convention](#) protocol described at the beginning of this chapter.

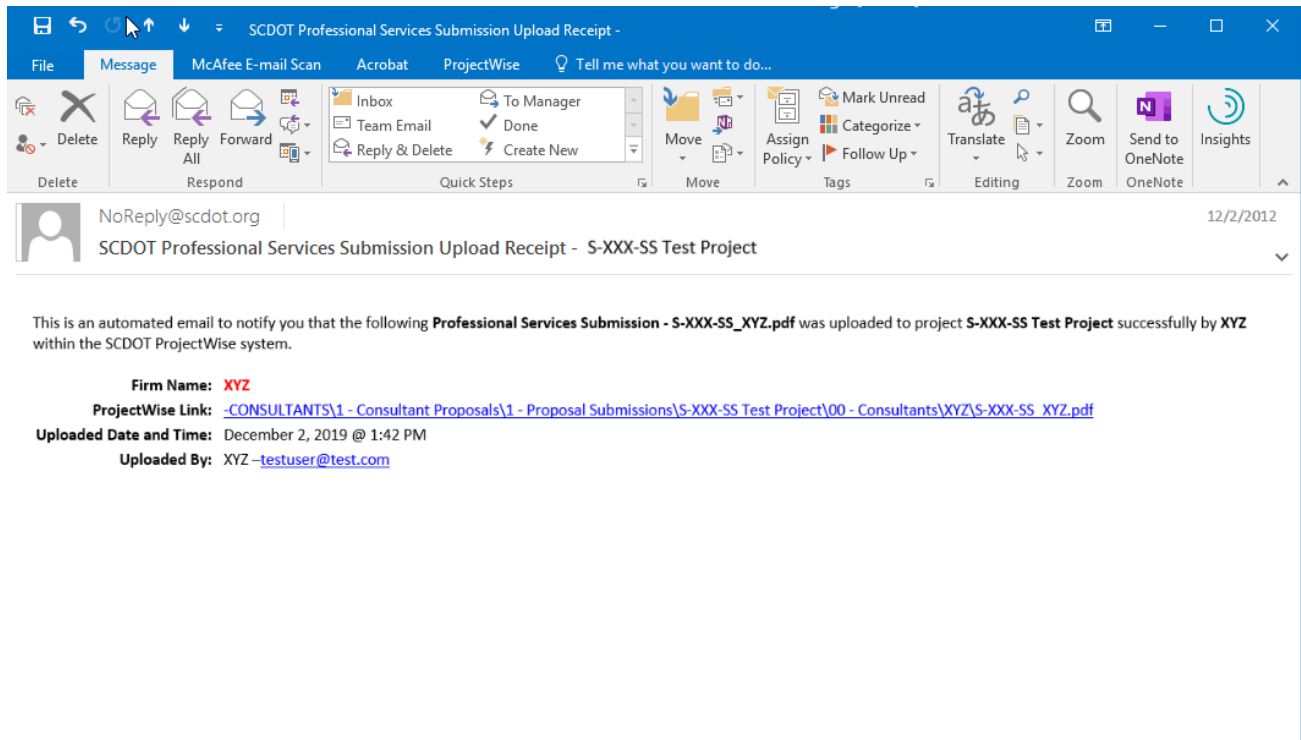
Example: PIN_ConsultantName.extension (Example: S-XXX-SS_XYZ.pdf)



- c. Once the document upload process has completed, you can view the “**content pane**” to view your document.
 - 1. The document that has been uploaded appears in the “**content pane**” within ProjectWise.
 - 2. Click “**Logout**” from the top right of the browser window to exit ProjectWise.



- g. You will receive a confirmation email after you upload is complete.



DESIGN BUILD ELECTRONIC SUBMISSION

(1). Document Naming Convention

When uploading files to ProjectWise, it is critical that all files are named consistently. By using these naming conventions SCDOT can maintain a uniform file structure in ProjectWise across all Design-Build Projects. The Design-Build File Naming Conventions can be located here: [Design Build Naming Convention](#). The Project ID is listed in the South Carolina Business Opportunities (SCBO) ad under the title of the Design Build solicitation and can also be found on the title page of the project's Request for Qualifications (RFQ) and the Request for Proposal (RFP).

(2). Accessing the SCDOT ProjectWise Web Parts Client Website

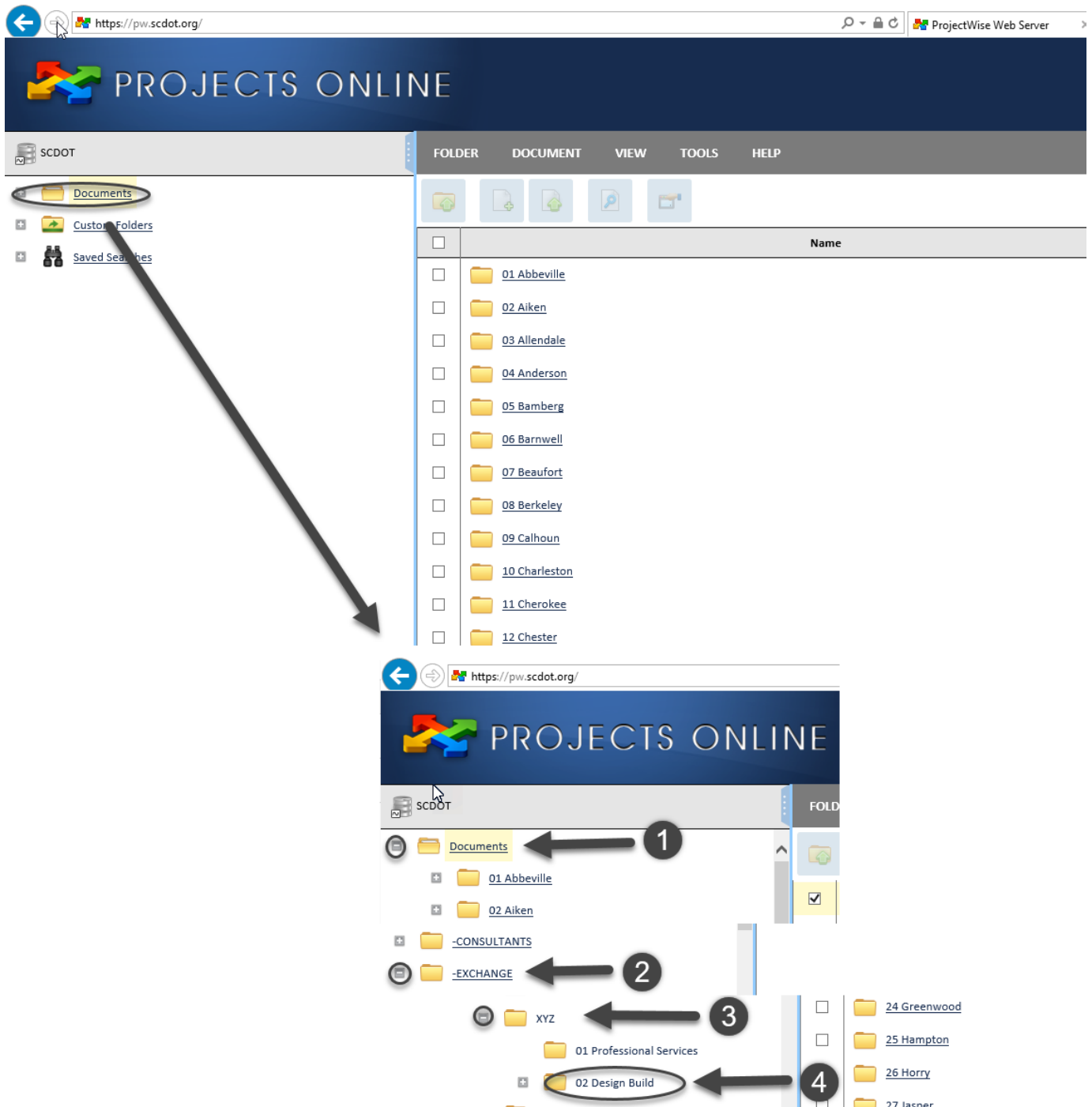
- a. Consultants and contractors can use the ProjectWise Web Parts Client to upload their documents by accessing <https://pw.scdot.org/>. If your firm uses ProjectWise Explorer, you can add the SCDOT Datasource and use it for uploads. Please contact **Matthew Boozer** at BoozerML@scdot.org or **Judy Hite** at HiteJT@scdot.org to receive a copy of the datasource configuration instructions. **ATC submittals require the use of ProjectWise Explorer**. Please contact **Brooks Bickley** at BickleyBJ@scdot.org for more information.

NOTE: It is *important* to follow the [ProjectWise V8i Web Parts Client Installation](#) section's instructions first to configure ProjectWise so users will be able to utilize the system.

1. Make sure that "SCDOT" is selected from the "Location:" drop down menu.
2. Enter the *user name* and *password* into the "User Name:" and "Password:" fields.
3. Then click the "Login" button.

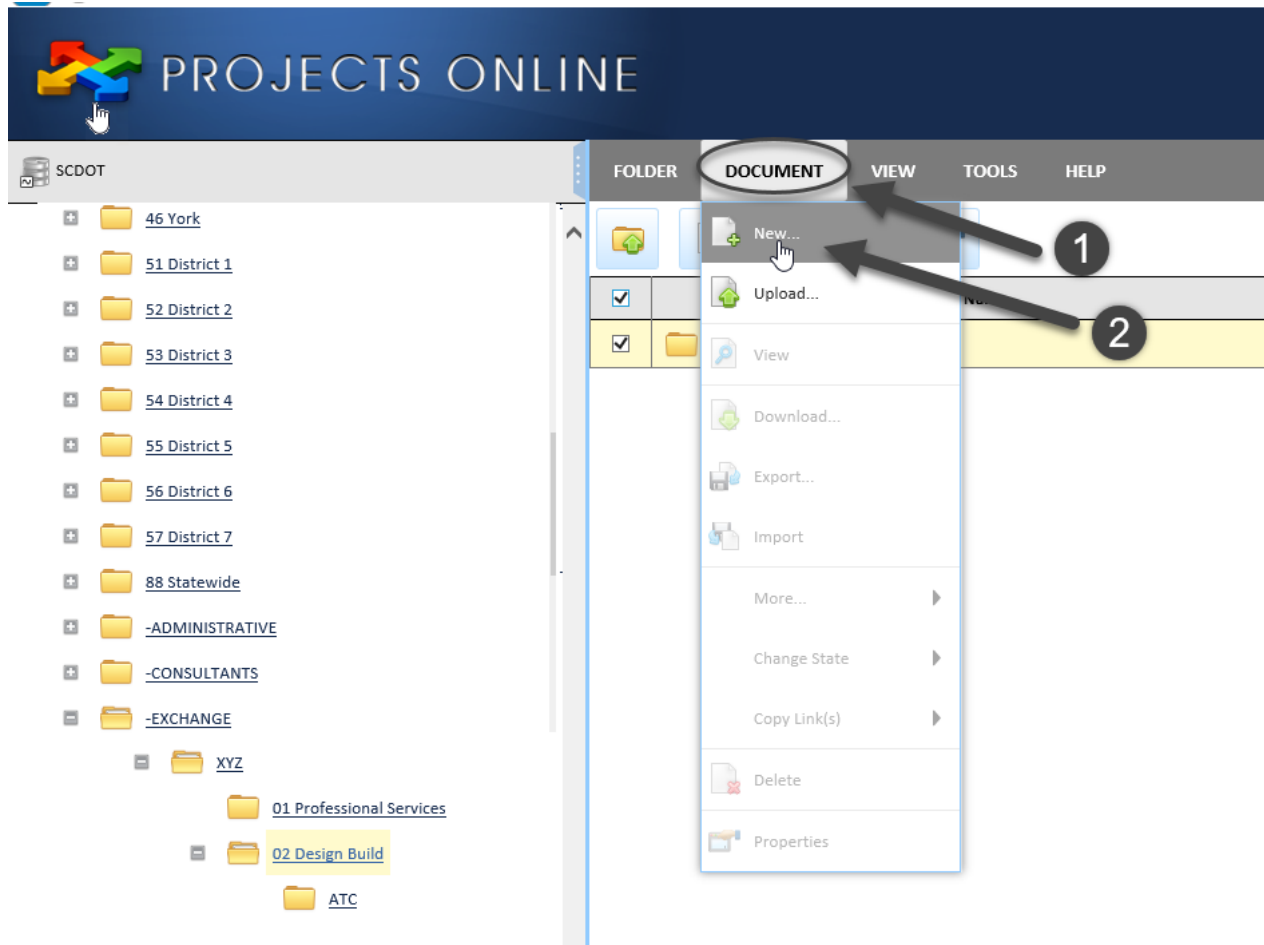


- b. After logging into ProjectWise, “Documents” will appear on the top-left of the tree pane.
 1. Expand the “Documents” folder from the *navigation tree* by clicking on the “+” sign beside the folder.
 2. Expand the “-EXCHANGE” folder by clicking on the “+” sign beside the folder.
 3. Then expand your company folder by clicking on the “+” sign beside the folder.
 4. Select the “02 – Design Build” folder.



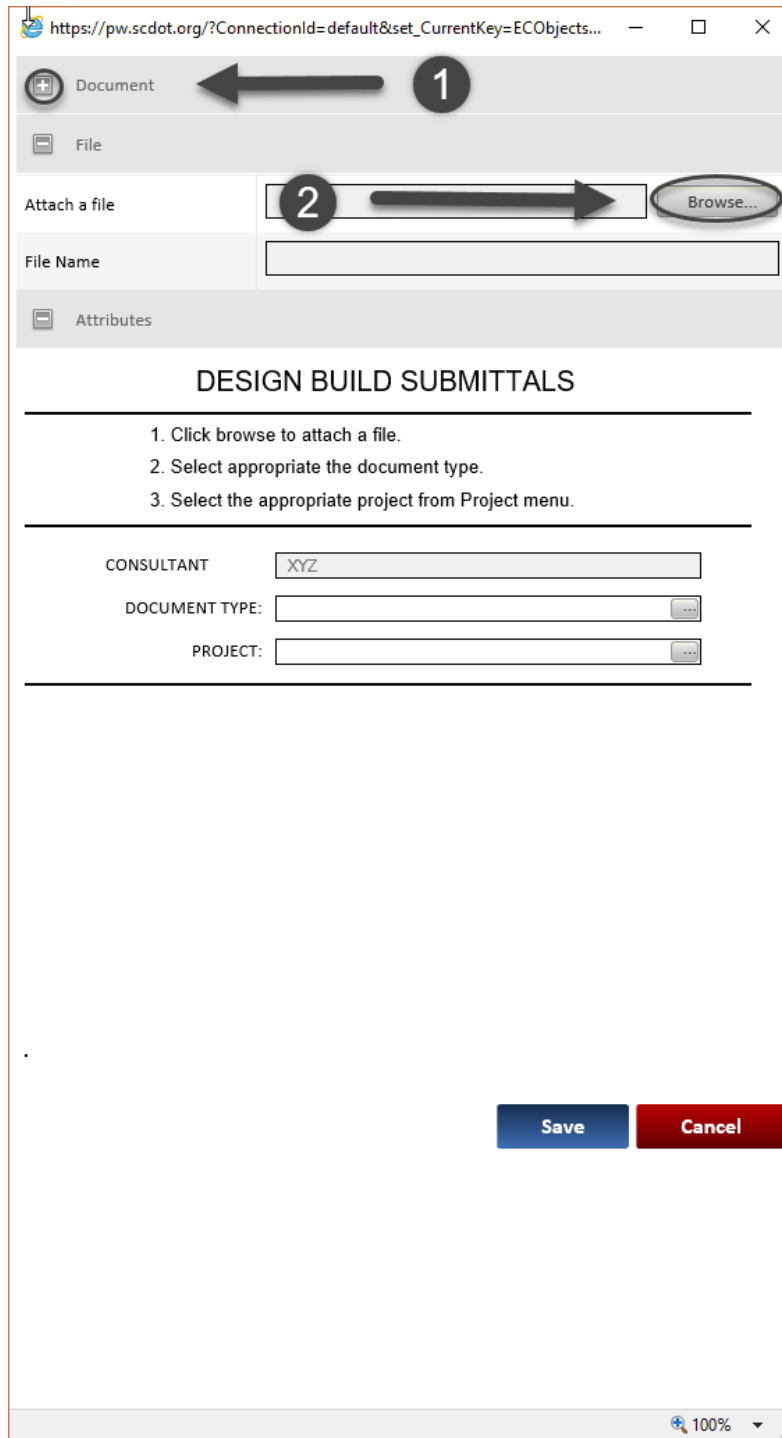
(3). Uploading a Document

- a. With the “02 – Design Build” folder selected, a document can be uploaded into the folder.
 1. Click on the “Document” dropdown from the menu.
 2. Then click the “New” option from the dropdown.




b. The “New Document” dialog box will appear

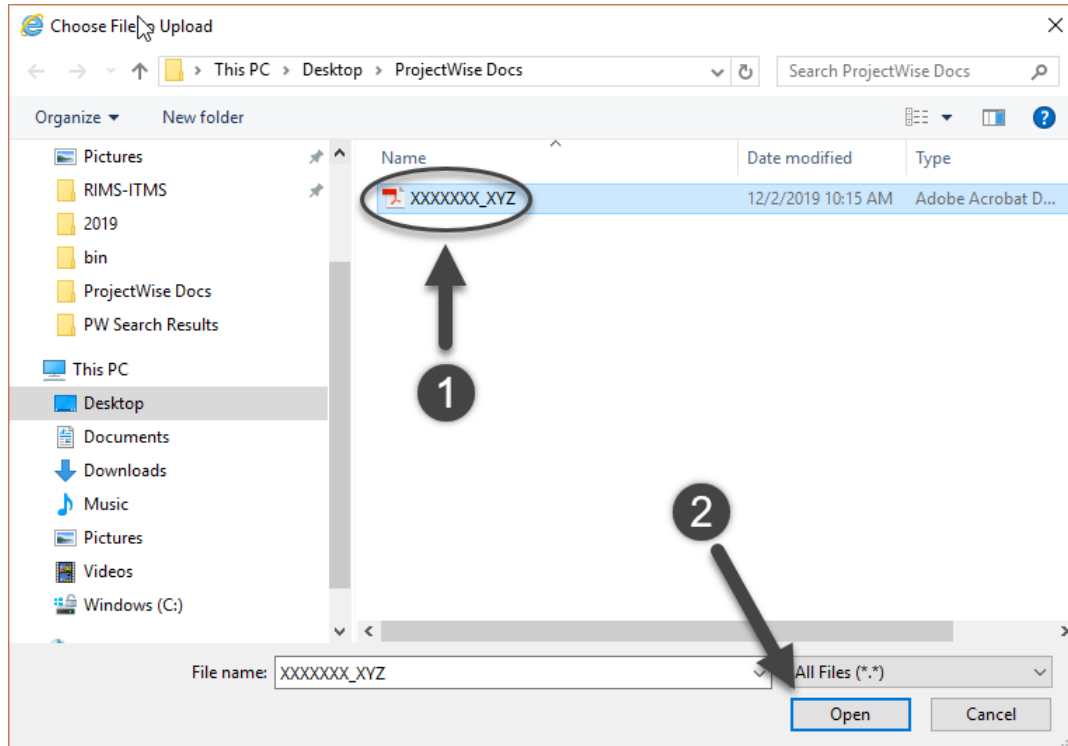
1. Minimize the "Document" tab.
2. Under the “File” tab, select the “Browse...” button.



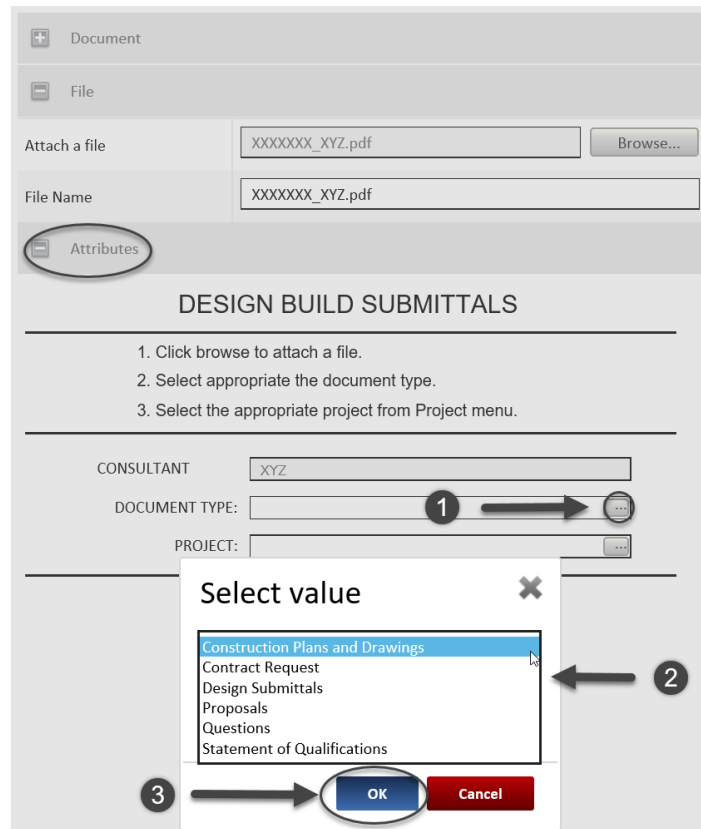
c. The “Choose File to Upload” dialog box will appear.

1. Navigate to the desired document and select it. 
2. Click the “Open” button on the “Choose File to Upload” dialog box.

NOTE: Use the [Design Build Naming Convention](#) protocol.



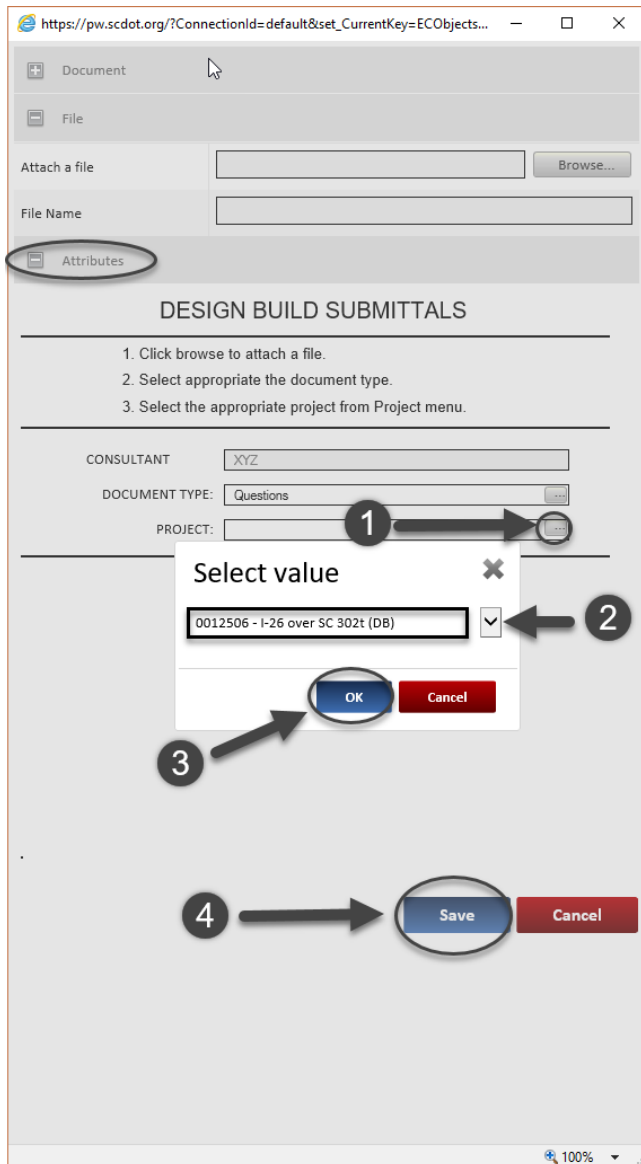
- d. The **“DOCUMENT TYPE”** attribute will help SCDOT identify the type of document.
1. Under the **“Attributes”** tab, click on the **“DOCUMENT TYPE:”** button and the **“Select Value”** dialog box will appear.
 2. From the **“Select Value”** dialog box, select the appropriate *document type* for the document from the dropdown options.
 3. Click **“OK”** on the **“Select Value”** dialog box.



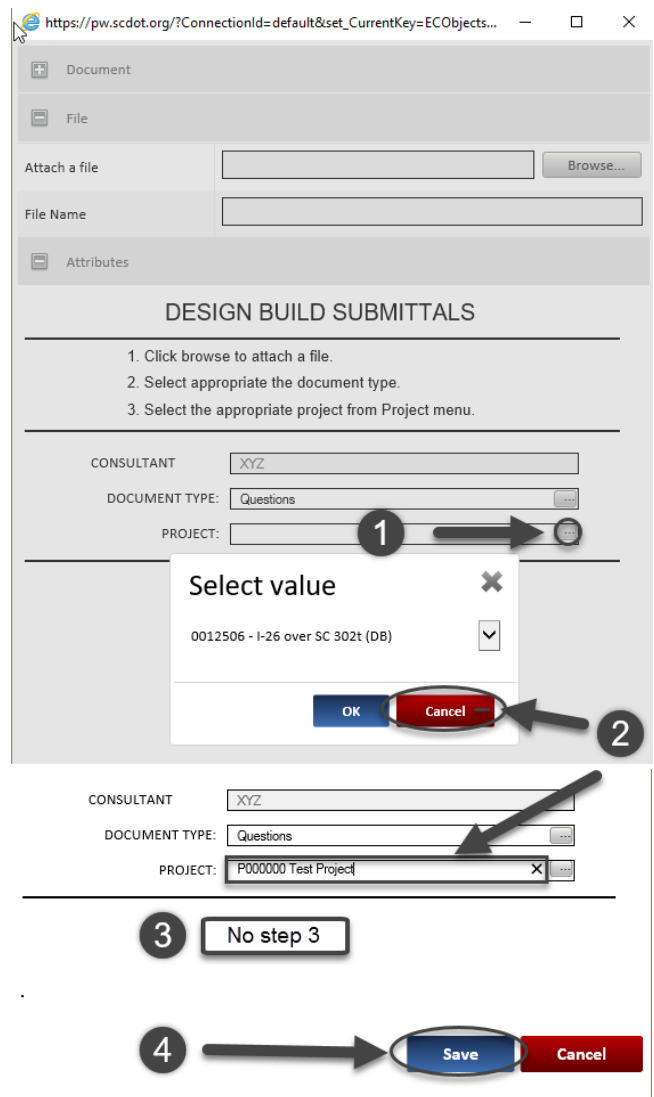
e. The **“Project”** attribute will help SCDOT identify which project the document belongs to.

1. Under the **“Attributes”** tab, click on the **“PROJECT:”** button and the **“Select Value”** dialog box will appear.
2. **A.** From the **“Select Value”** dialog box, select the appropriate *project* for the document from the dropdown options (see **“Example A”**).
B. If Project is not listed, click **“Cancel”** to close **“Select Value”** box. Manually type the name in (see **“Example B”**).
3. Click **“OK”** on the **“Select Value”** dialog box (Nothing to select in **“Example B”**).
4. Click **“Save”** on the **“New Document”** dialog box.

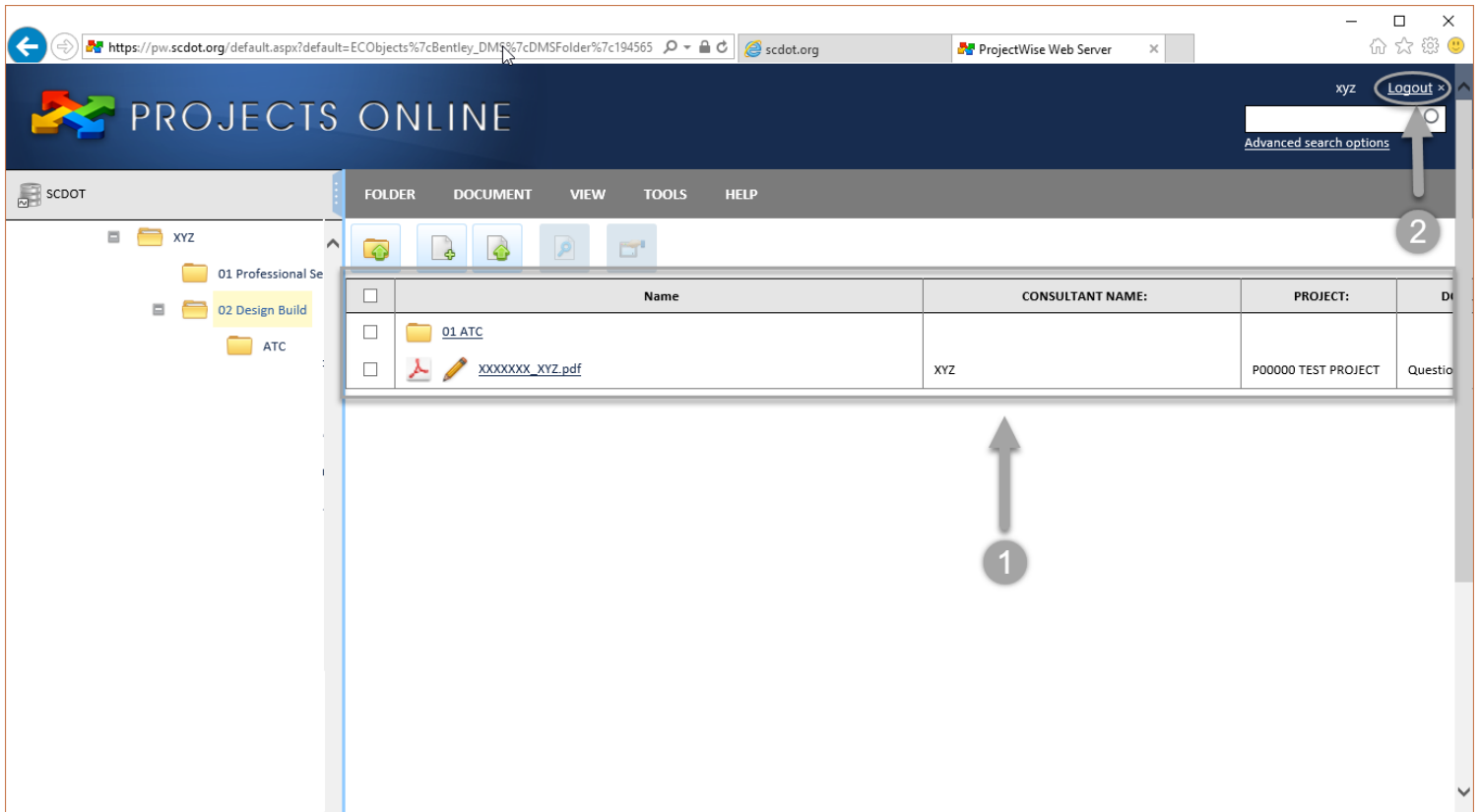
EXAMPLE A



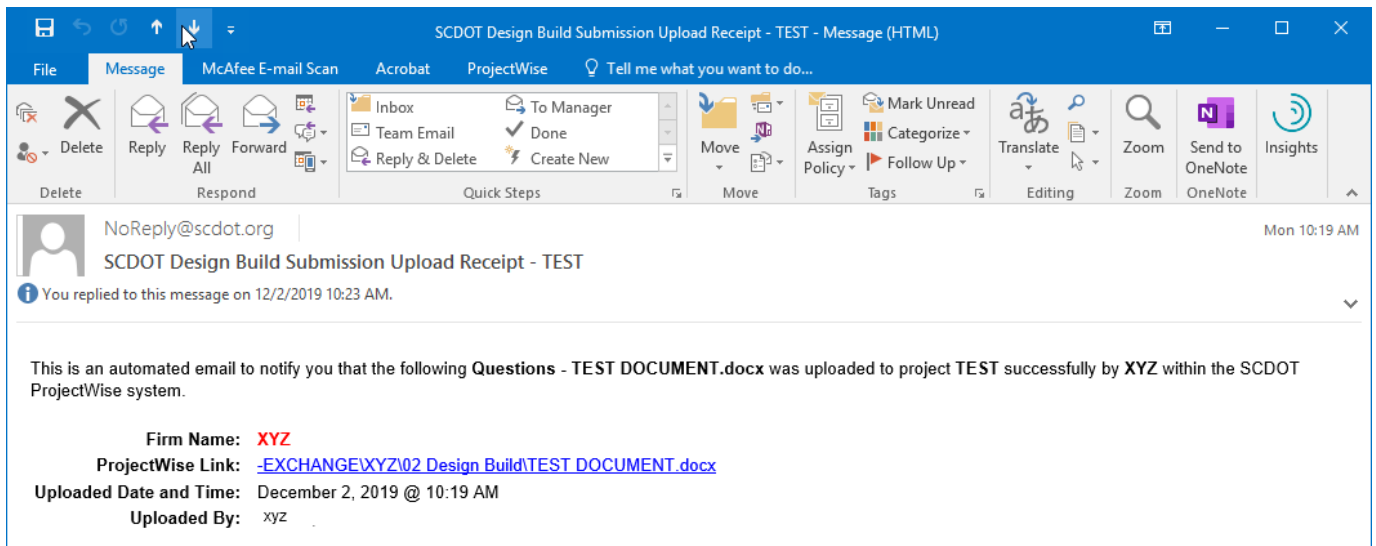
EXAMPLE B



- f. Once the document upload process has completed, you can view the “**content pane**” to view your document.
 - 1. The document that has been uploaded appears in the “**content pane**” within ProjectWise.
 - 2. Click “**Logout**” from the top right of the browser window to exit ProjectWise.



- g. You will receive a confirmation email after you upload is complete.



RIGHTS OF WAY TEMPLATES ELECTRONIC RETRIEVAL

(1). Accessing the SCDOT ProjectWise Web Parts Client Website

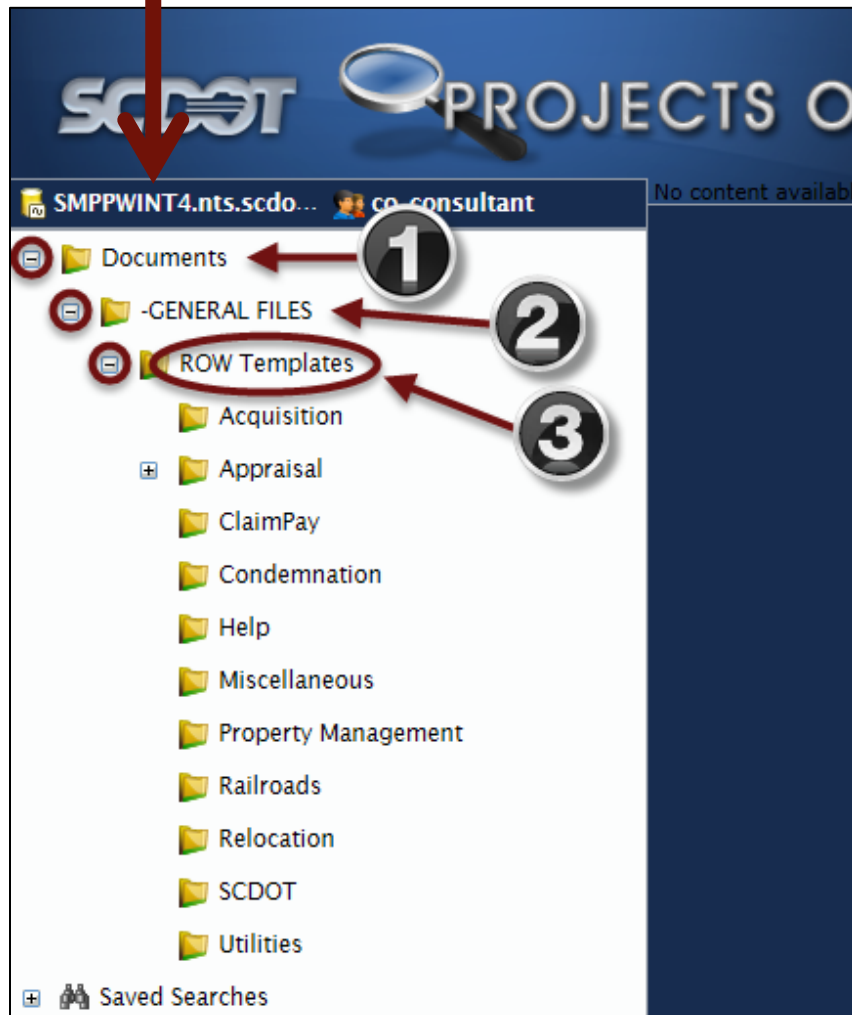
- a. Rights of Way firms will use the ProjectWise Web Parts Client to retrieve *Rights of Way Templates* by accessing <https://pw.scdot.org/>.

NOTE: It is **important** to follow the **ProjectWise V8i Web Parts Client Installation** section's instructions first to configure ProjectWise so users will be able to utilize the system.

1. Make sure that “SCDOT” is selected from the “Location:” drop down menu.
2. Enter the *user name* and *password* into the “User Name:” and “Password:” fields.
3. Then click the “Login” button.



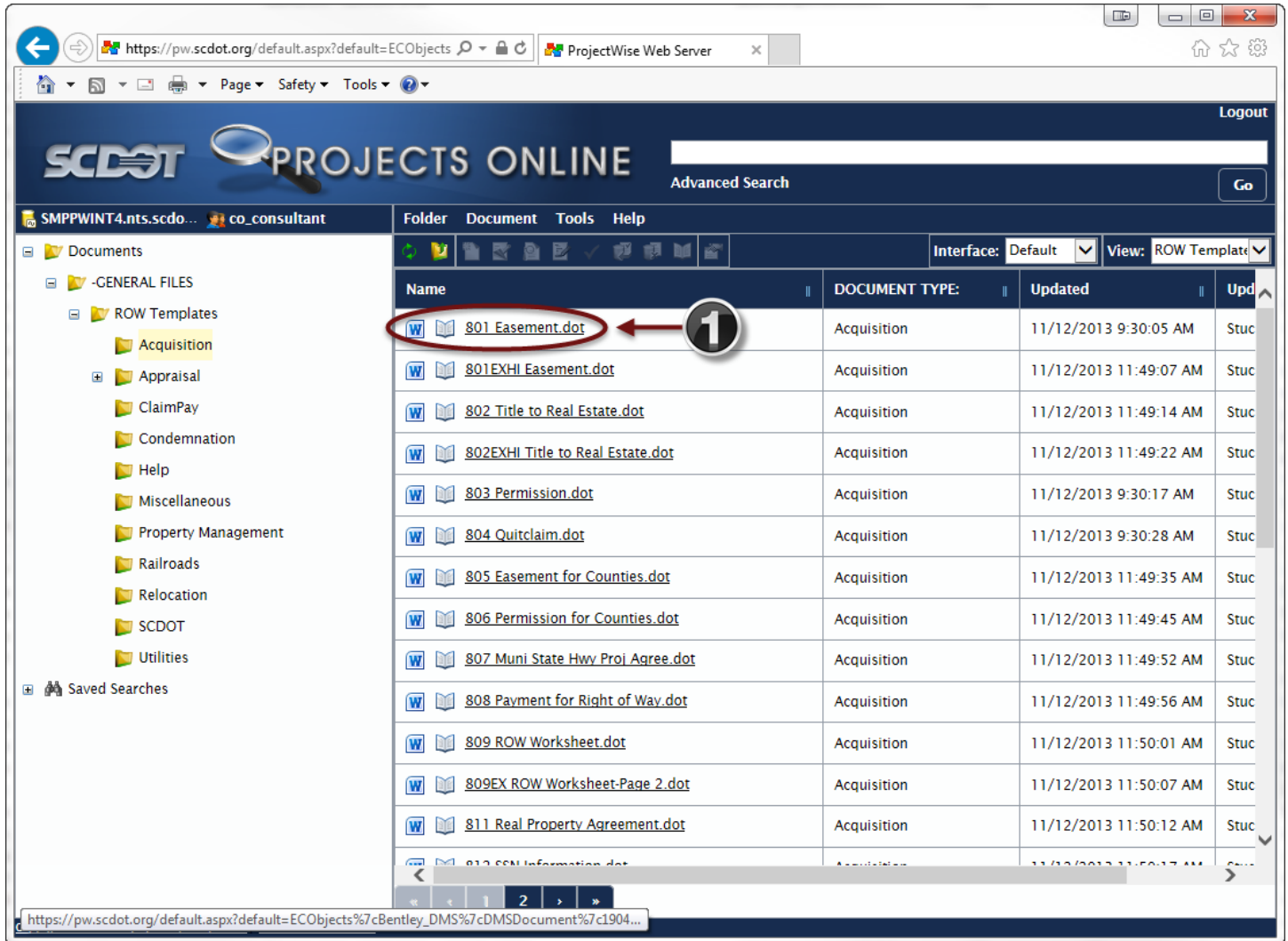
- b. After logging into ProjectWise, “Documents” will appear on the top-left of the tree pane.
1. Expand the “Documents” folder from the *navigation tree* by clicking on the “+” sign beside the folder.
 2. Expand the “-GENERAL FILES” folder by clicking on the “+” sign beside the folder.
 3. Then expand the “ROW Templates” folder by clicking on the “+” sign beside the folder to select the desired template folder and the document(s) will appear in the ProjectWise “content pane” for the folder you selected.



(2). Retrieving and Saving a Template

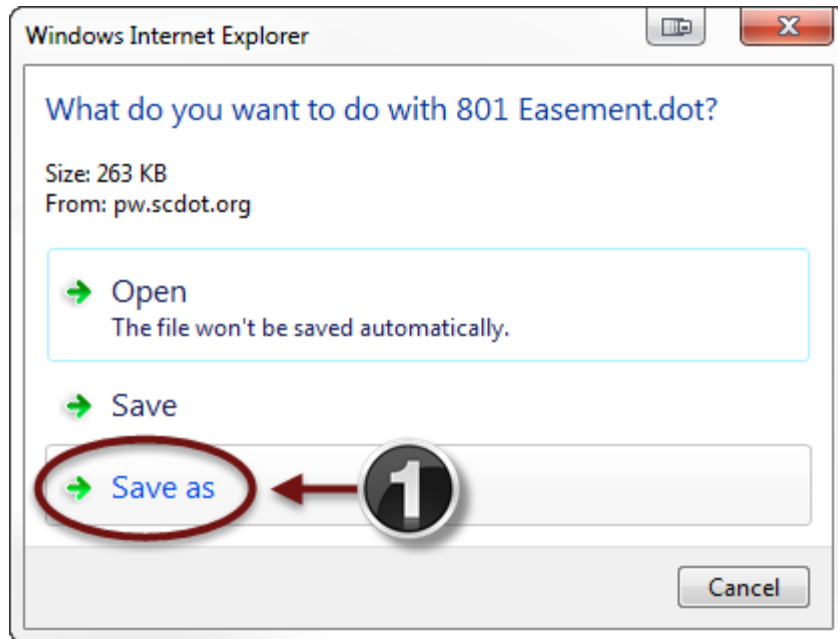
- a. With the “**ROW Templates**” expanded and the desired subfolder selected, a template can be opened within Microsoft Word or Excel.

- 1. Single click on the desired template from the ProjectWise “**content pane.**”



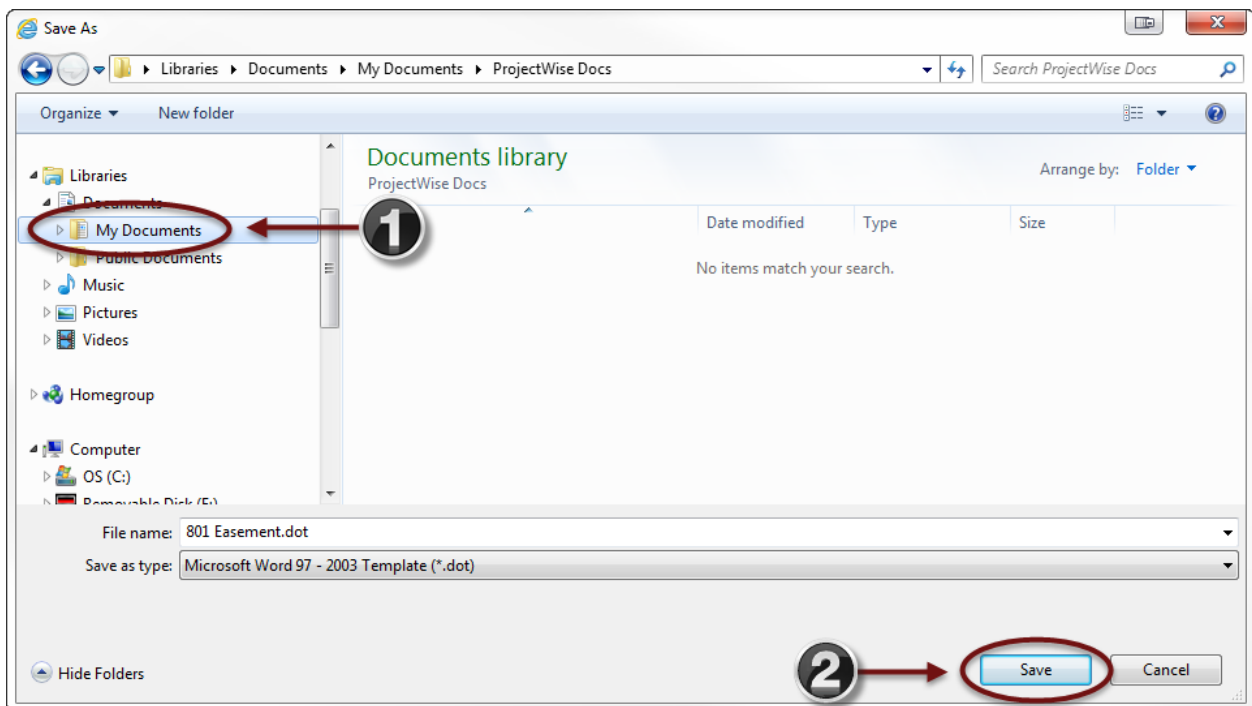
b. The “Windows Internet Explorer” dialog box will appear.

1. Single click the last option “Save as.”



c. The “Save As” dialog box will appear.

1. Navigate to the desired folder and select it.
2. Click the “Save” button on the “Save As” dialog box.



- d. A dialog box will appear at the bottom of the browser.
 - 1. Select **“Open”** to open the saved document or the file can be opened at a later time by navigating to the folder where it was saved.

