Columbia River Crossing

ProjectWise Management Plan
March 2011

1. Scope

Introduction

The goal of this PMP is to provide standards to be used by all members of the Columbia River Crossing Project (CRC) to access and manage the architectural and engineering drawings through the life of the Project. The instructions are guidelines and boundaries, not barriers, for our team members, and are intended to supplement WSDOT documents.

General Information:

MicroStation, InRoads and ProjectWise will be used for this Project. Work by team members must be delivered in MicroStation, using current WSDOT and CRC Expanded Levels standards.

All Project MicroStation, InRoads and survey files will be stored and accessed via ProjectWise.

This PMP has been created for use by the CRC. During this Project, the software, standards, regulations, and team members will change. A reasonable effort will be made to keep this document current and relevant. If issues are found that do not reflect a current situation, please call them to the attention of the CRC CAE Manager to have them addressed.

Document Locations

The CRC is using ProjectWise as its design file management software. Files/documents created from MicroStation, InRoads, survey or other specialty design software will be in ProjectWise. For information on other file/document management, please check with the Project's Document Controls group.

i. CRC ProjectWise

The **ProjectWise Explorer** database is used for storing MicroStation, InRoads and survey files. Other file types supporting MicroStation and Inroads are also stored in this database. Users must have a CRC ProjectWise account in order to access the Project. ProjectWise licenses are automatically distributed through CRC.

Software and Versions used for Design and Drafting

Currently, the CRC Project uses the following versions of Computer Aided Engineering (CAE) software:

MicroStation V8 XM (V08.09.04.111)

InRoads XM Edition (V08.09.03.06)

ProjectWise Explorer V8i (Select Series 1)

These versions will be updated as necessary. Other software may be used for design, some of which will have graphic output that may be included in MicroStation files. Coordinate with the CRC CADD Manager to establish appropriate symbology.

ProjectWise Support Organization

ii. Support by Discipline

A contact support protocol has been established by the CRC ProjectWise Administrator. When Users experience ProjectWise issues, their organization's local ProjectWise support person is to be contacted. If the issue cannot be resolved by that support person, the following are to be the secondary contact (by discipline) – These contacts are also responsible for providing the CRC ProjectWise Administrator with information needed to establish new User accounts (See Appendix A):

Matt Deml (HDR) – *Columbia River and other "over-water" structures*
demlm@ColumbiaRiverCrossing.org
360-816-2193

Joel Tubbs (HDR) – *Landside Structures*
tubbsj@ColumbiaRiverCrossing.org
360-816-8877

Gavin Oien (DEA) – *Highway / Right of Way*
oieng@ColumbiaRiverCrossing.org
360-816-2176

Vicky Smith (DEA) – *Transit*
smithv@ColumbiaRiverCrossing.org
360-816-8887

Heather Wills (ODOT) – *Environmental*
willsh@ColumbiaRiverCrossing.org
360-816-2199

Daniel Teran (WSDOT) – *Utilities Mapping*
terand@ColumbiaRiverCrossing.org
360-816-2205

Upon receiving notification that a User is experiencing ProjectWise issues, the above contacts will notify the CRC ProjectWise Administrator.

iii. CRC ProjectWise Administrator

The CRC CAE Systems Manager serves as CRC ProjectWise Administrator. He is responsible for establishing accounts for new Users, assigning Users to groups, and making modifications to these groups as needed. He is also a resource for troubleshooting problems within ProjectWise.

Ray Barker
barkerr@ColumbiaRiverCrossing.org
(Business Hours)   360-816-8854   (After Hours)   360-903-1316

iv. Additional ProjectWise Support

In the event that the CRC ProjectWise Administrator is not available, below are additional support contacts:

WSDOT HQ CAE Help Desk
HQCAEHelpDesk@wsdot.wa.gov
(Business Hours)   360-709-8013

Scott Soper (WSDOT CAE Emerging Technologies Coordinator)
sopers@wsdot.wa.gov
(Business Hours)   360-709-8005   (After Hours)   360.485.8703

2. ProjectWise

Introduction

ProjectWise is a network document management tool that allows multiple Users to collaborate from various locations to work on the same Project(s). ProjectWise allows a User to checkout a document or file, modify it, and then check the file back in to the network so others can reference the work. Unlike Microsoft Windows Explorer environments with a "real & tangible" folder and file structure, ProjectWise Explorer is a database where each file is a record in that database. .

Users and Groups

User: Anyone with an assigned login and access to ProjectWise.

Groups: Selection of Users who have same access/privileges to a folder or document. This function is used to manage access. At the CRC, ProjectWise has the following discipline groups:

- Administrator
- Super User
- CADD
- Design
- Read Only

A User may be a member of multiple ProjectWise groups. Most Users will fall into either the **CADD** group or **Design** group, depending on their roles and duties. Some Users are in both **CADD** and **Design** groups. If you are unable to perform a function, it may be because of your group assignment and the respective access rights. To request modification of User permissions, please follow prescribed support protocol (See Section D, this document).

Folder and Document Security and Access

Only an Administrator has permissions to change security of documents and folders.

The CRC ProjectWise Administrator will manage the assignment of group permissions for the folders and documents for their respective Project folders.

Typical securities setting for Project folders.

Discipline Groups	CADD Folders - access	Design Folders - access
• **CADD**	Create, Read, Write	Create, Read, Write
• **Design**	Create, Read, Write	Create, Read, Write
• **Read Only**	Read	Read

The CRC CADD Manager may request the CRC ProjectWise Administrator to create different groups to suit their work flow or task assignments. The CRC CADD Manager develops list of Users, recommends their group assignment, then forwards to the CRC ProjectWise Administrator. Once the group is created, the CRC ProjectWise Administrator assigns them to the folders.

The CRC CADD Manager or the Discipline Support contacts will gather new User account information, complete and forward the New User Application document to the CRC ProjectWise Administrator for account setup. (See Appendix A)

The CRC ProjectWise Administrator will schedule installation of ProjectWise on User's machine. The CRC CADD Manager will provide instruction and/or training on ProjectWise as necessary.

The CRC ProjectWise Administrator will maintain a current list of Users, their group assignment, and any unique access privileges necessary to perform their tasks. The CRC CADD Manager will submit requests for changes in User's group assignment to the CRC ProjectWise Administrator. They will also notify the CRC ProjectWise Administrator of Users who will no longer be working on the Project as soon as that is established.

Folder and Document Creation and Handling

The CRC ProjectWise Administrator has rights to create the folders, sub-folders, and documents as needed. Members of the CADD and Design Groups have rights to create sub-folders and documents. Other groups have various permissions assigned by the CRC ProjectWise Administrator.

Folder Structure

Under the "Documents" folder, folders are established for each Project. The Project folders enable the ProjectWise Administrator to manage access/permissions to design files, assist other team members in locating information, and facilitate document maintenance.

> All Users have permission to view/read-only all files under the CRC Project folder.

> Users have additional rights under their Project folder depending on their role in the Project. The CRC ProjectWise Administrator establishes and maintains this property.

> Each User may have a working folder assigned to them where they may create and maintain sub-folders and documents for their use. Under this folder, Users should store any MicroStation and Inroads files they are actively working with. Other files should be referenced into these working/scratch files.

Note: The file naming and folder structure within ProjectWise is based on the guidelines established by the WSDOT Electronic Engineering Data Standards (EEDS) Manual (May 2010).

Appendix A. ProjectWise New User Application

1. Please provide the following information:
   Requestor Name:

   Email:

   Phone #:

   New User Name:

   Organization:

   Email:

   Phone No:

   Their direct task lead/manager's name:

   Discipline and specific task (if known):

   Role:

   Access Needed:for ProjectWise:
   (Example -- CADD, Design, Manager/Reviewer (Read Only))

   Your Organization's ProjectWise contact person:

   Name:

   Email:

   Phone No:

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2. Submit above information by email to the CRC ProjectWise Administrator:
   - Ray Barker
     barkerr@columbiarivercrossing.org
     360-816-8854 (office)

When new User account has been established, the CRC ProjectWise Administrator will email User with the login name and password and attach the links to:

   - **CRC ProjectWise Management Plan**
   - **CRC ProjectWise Quick-Start Guide**