



C8 – Configuring Your Project for Success

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Agenda

- Work Areas
- Participants
- Roles
- Resources
- Notifications
- Template Work Area(s)
- Configuration Order

Work Areas

A work area is a special type of folder. Work areas can contain everything a folder can contain. In addition, work areas can contain saved searches, a component index and so on. Work areas are a single place to manage and organize documents, data, and resources related to a given real-world project.



Not a work area

Folder Properties

Document Security	View	Audit Trail	WorkSpace	Rendition Profiles
General	Spatial	Statistics	Workflow & State	Work Area\Folder Security



Local ProjectWise work area



Connected work Area

Work Area Properties

Audit Trail	Participants	ProjectWise Project	WorkSpace			
General	Spatial	Statistics	Workflow & State	Resources	Properties	View

Participants

- Users
- Groups
- User Lists

Roles

Administrator

- Full control
- Change permissions
- Create subfolders
- Delete
- Read
- Write
- No access

- Full control
- Change permissions
- Create
- Delete
- Read
- Write
- Change Workflow State
- File Read
- File Write
- Free
- No access

Leader

- Full control
- Change permissions
- Create subfolders
- Delete
- Read
- Write
- No access

- Full control
- Change permissions
- Create
- Delete
- Read
- Write
- Change Workflow State
- File Read
- File Write
- Free
- No access

Team Member

- Full control
- Change permissions
- Create subfolders
- Delete
- Read
- Write
- No access

- Full control
- Change permissions
- Create
- Delete
- Read
- Write
- Change Workflow State
- File Read
- File Write
- Free
- No access

Observer

- Full control
- Change permissions
- Create subfolders
- Delete
- Read
- Write
- No access

- Full control
- Change permissions
- Create
- Delete
- Read
- Write
- Change Workflow State
- File Read
- File Write
- Free
- No access

No Access

- Full control
- Change permissions
- Create subfolders
- Delete
- Read
- Write
- No access

- Full control
- Change permissions
- Create
- Delete
- Read
- Write
- Change Workflow State
- File Read
- File Write
- Free
- No access

Resources

Application

Department

Environment

Storage

View

Workflow

WorkSpace Profile

Component Custom Folders

Rendition Profile

The resources of a work area are a subset of the datasource's resources, such as applications, departments, environments, and so on. The Resources tab of the Project Properties dialog lets you select which of those resources you want to make available to users of the selected work area. A work area can either inherit resources from its parent work area, from the datasource, or it can have its own subset of resources.

Notifications

- Add multiple notifications to any state change
 - Using ProjectWise Messaging
 - Includes a link to the document
 - Using MS Outlook
 - Optional, include document as attachment.
 - Send to multiple users, groups or mailing lists

Template Work Area(s)

- Use a pre-setup Work Area as template for new Work Areas
 - Including Sub Folders
 - Workflows
 - Access Rights
- Use an existing Work Area as Template for new Work Area
 - Options to copy data from “template work area” to new Work Area

Configuration Order

- Storage Area(s)
- User(s), Group(s) and/or User List(s)
- Workflow(s)
- View(s)
- Workspace(s)
- Rendition Profile(s)



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