

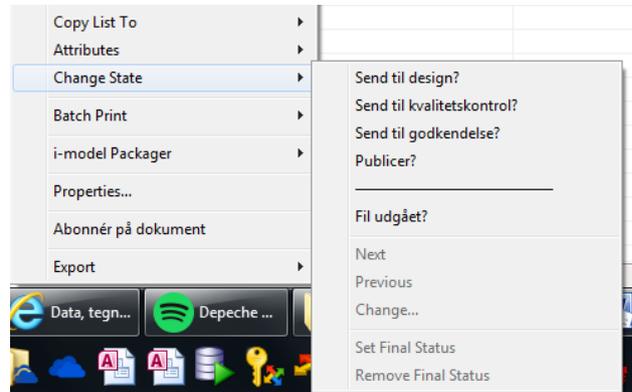
Workflows and states

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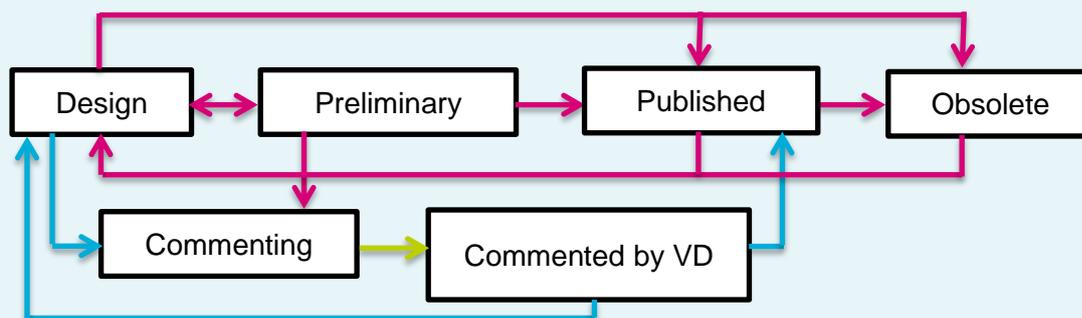
Workflow

A workflow is a collection of states that data shall pass through to become published and thus achieve status as valid data.

To send a file from one state to another, right-click on the file in ProjectWise and select 'Change State'. Then select the state to which the file should be sent.

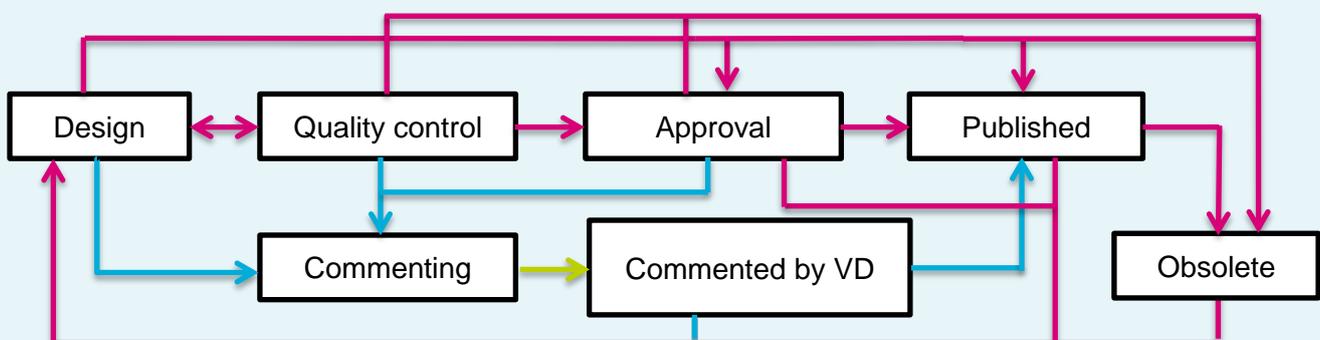


Workflow for documents:



- Both internals and externals
- Only externals
- Only internals and the Danish Road Directorate's consultant

Workflow for technical models:



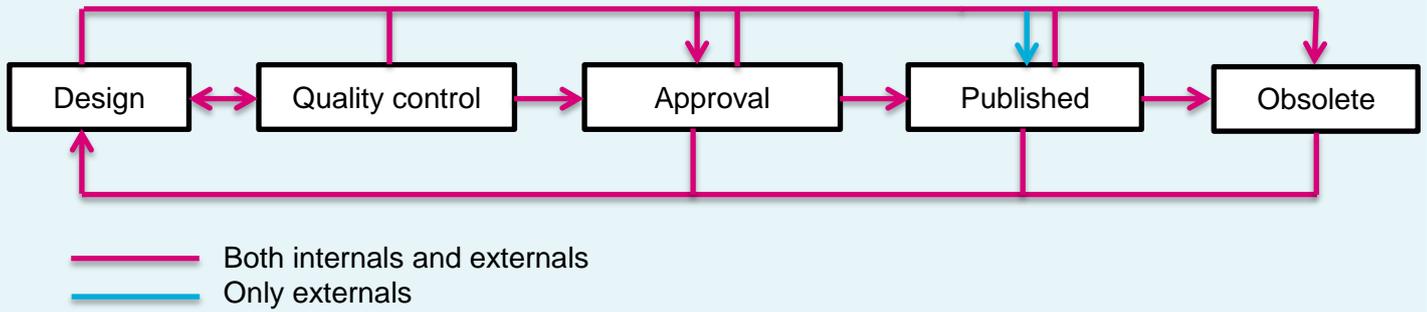
- Both internals and externals
- Only externals
- Only internals and the Danish Road Directorate's consultant

DISCLAIMER

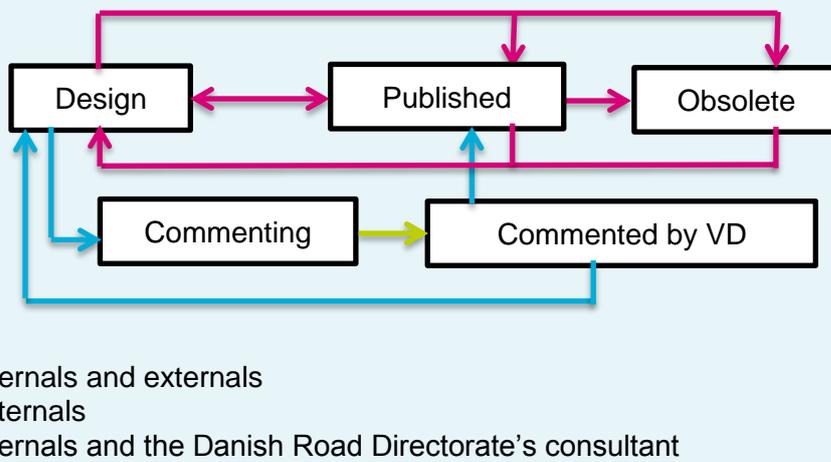
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Workflow for MicroStation drawings:



Workflow for PDF drawings



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States in workflows

Below is a description of each state in the Danish Road Directorate's ProjectWise. Also a description on how you send a file to that particular state, how they each work and what user lists have rights to what at the individual state, can be read.

• Design

- Description

All data in ProjectWise starts at the 'Design' state. Data at the other states can in most cases be sent to the Design state for editing.

- Method

Right-click on the file, select 'Change State' and click on 'Send til design?' (Send to design?)

- Function

Data at the design state can be edited, deleted, sent to other states in the workflow, etc.

Several attributes have to be filled before data can be sent to a different state.

For example, the Danish Road Directorate's external business partners shall fill in the attributes 'Document type' and 'Originator (Companyname)' before data can be sent to a different state. And the attributes 'Designer', 'Review' and 'Approved' shall be filled for technical models and MicroStation drawings before they can be sent to the 'Published' state.

NOTE: If data has several versions, it cannot be deleted. Instead it can be sent to the 'Obsolete' state. Read about the Obsolete state below.

- Rights

At the design state, users who have been granted these rights can create, edit and send data to the next state.

• Preliminary

- Description

This state is only part of the workflow and linked to folders, in which documents can be created, i.e. in folders which do not contain CAD data.

The state is only used if more than one person cooperate on the preparation of a document.

-Method

Right-click on the file, select 'Change State' and click on 'Send til foreløbig?' (Send to preliminary?)

-Function

Documents at the Preliminary state, can be sent to the Design, Published or Commenting state.

When a new document is created at the Design state, the document can be drafted. When it is ready for somebody else to edit the document, it can be sent to Preliminary. At the Preliminary state, it will be read-only, until it is sent to the Design state for further editing. In the meantime, a version copy of the document has been made to allow the user to go back and see who has edited and what has been edited.

- Rights

Documents at the Preliminary state are read-only and cannot be edited by anyone. However, all users linked to the project can send documents to the Design or Published state.

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- **Quality Control**

- Description

- This state is part of the workflow and linked to folders in which technical models or drawings can be created in MicroStation format, i.e. in folders which contain CAD data.

- This state is used for quality control of CAD data.

- Method

- Right-click on the file, select *'Change State'* and click on *'Send til kvalitetskontrol?' (Send for quality control?)*

- Function

- CAD data at the Quality Control state can be sent to the Design, Approval or Commenting state.

When a new CAD file is created at the Design state, the file can be designed. When it is ready for quality control, it can be sent to the Quality Control state. At this state, it will be ready-only. When the file is sent to the Design or Approval state, it is automatically written in the attribute *'Review'* who has performed quality control of the data.

Internals in the Danish Road Directorate have to send CAD data to the Quality Control state if required by the CAD data. For the Danish Road Directorate's external business partners, this is optional. However, the attribute *'Review'* have to be filled with the name or initials of the person who performed quality control of the data. In that case, this attribute is filled at the Design state.

- Rights

- CAD data at the Quality Control state is read-only and cannot be edited by anyone.

- However, users who are members of the user group *'VD_KS_list'* or *'XX_KS_list'* can send files to the Design or Approval state.

- **Approval**

- Description

- This state is part of the workflow and linked to folders, in which technical models or drawings can be created in MicroStation format, i.e. in folders which contain CAD data.

- This state is used for approval of CAD data as required by the Danish Road Directorate.

- Method

- Right-click on the file, select *'Change State'* and click on *'Send til godkendelse?' (Send for approval?)*

When a CAD file is at the Quality Control state, it can be sent to Approval. It is also possible to send a file from the Design state to Approval, however, this requires that it has been sent for quality control at least once.

CAD data at the Approval state will be read-only.

When the file is sent to the Published state, it is automatically written in the attribute *'Approved'* who has approved the data.

Internals in the Danish Road Directorate have to send CAD data to the Approval state if required by the CAD data. For the Danish Road Directorate's external business partners, this is optional. However, the attribute *'Approved'* have to be filled in with the name or initials of the person who approved the file. In that case, this attribute is filled in at the Design state.

- Rights

- CAD data at the Approval state is read-only and cannot be edited by anybody.

- However, users who are members of the user group *'VD_Approver_list'* or *'XX_Approver_list'* can send files to the Design or Published state.

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- **Commenting**

- Description

- This state is part of the workflow and linked to folders in which documents, technical models or drawings in PDF format can be created.

- This state is used by the Danish Road Directorate's business partners to have data commented on by the Danish Road Directorate.

- Method

- Right-click on the file, select *'Change State'* and click on *'Send til VD for kommentering?'* (*Send to VD for commenting?*)

- Function

- Data at the Commenting state can only be sent to the Commented by VD state.

Before data is sent to the Published state, the Danish Road Directorate's business partners can send it to the Commenting state.

Here, the Danish Road Directorate or the Danish Road Directorate's consultants can comment on data. The attribute *'Comments'* have to be filled and it will subsequently be logged by whom and when the data was commented and what version was commented.

NOTE: If edited by other people, who should not edit the comments attribute, this will also be logged.

- Rights

- Data at the Commenting state is ready-only and cannot be edited by anyone. However, the Danish Road Directorate and its consultants linked to the project has the right to fill in the attribute *'Comment'* and send files to the Commented by VD state.

- **Commented by VD**

- Description

- This state is part of the workflow and linked to folders in which documents, technical models or drawings in PDF format can be created.

- This state is used to tell the Danish Road Directorate's business partners that data sent for commenting have been commented by VD.

- Method

- Right-click on the file, select *'Change State'* and click on *'Kommenteret af VD?'* (*Commented by VD?*)

- Function

- Data at the Commented by VD state can be sent to the Design or Published state.

If, as a result of any comments, data at the Commenting by VD state should be edited, it can be sent to the Design state for editing. Otherwise, it is possible to send data to the Published state.

At the Design state, it is possible to fill in the attribute *'Response'*. This attribute is considered as a reply to any comments made by the Danish Road Directorate.

- Rights

- Data at the Commented by VD state is read-only and cannot be edited by anyone.

- However, all the Danish Road Directorate's business partners linked to the project can send files to the Design or Published state.

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- **Published**

- Description

- NOTE:** Only data at the '*Published*' state is considered valid.
Some users cannot see data unless it is at the Published state.

- Method

- Right-click on the file, select '*Change State*' and click on '*Publicer?*' (*Publish?*)

- Function

- Data at the Published state is considered valid.

Data at the Published state can be sent to the Design state.

When data is sent to the Design state, it corresponds to creating a new version. The 'old' version will remain at the Published state and will continue to be the valid version until the new version is at the Published state.

- Rights

- Data at the Published state is read-only and cannot be edited by anyone. However, all users linked to the project can send files to the Design state.

- **Obsolete**

- Description

- This state is for obsolete data.
No users can see data at this state.

- Method

- Right-click on the file, select '*Change State*' and click on '*Fil udgået?*' (*Obsolete*)

- Function

- Data at the Obsolete state is considered obsolete data.

Data at all other states can be sent to the Obsolete state.

When data is sent to the Obsolete state, no users will be able to see the data.

A file can only be deleted at the Design state if it has no sub-versions. If you want to remove a file with more versions from ProjectWise so that nobody else can see it, you have to send it to the Obsolete state.

- Rights

- Nobody can see data at the Obsolete state, and data is read-only.
However, ProjectWise administrators can reintroduce the file to the Design state if necessary.

Remember:

You can always see the state of a file in ProjectWise in the column '*State*'.

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