

Document – Creation

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Creating a new document

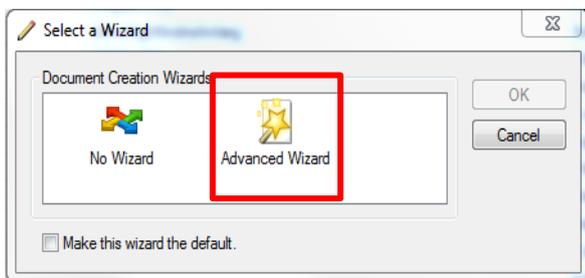
When creating or delivering a document to the Danish Road Directorate, it is important that the filename is consistent with The Danish Road Directorate's standard for naming non-cad documents in ProjectWise.

Note: A document is not finally valid until it is at the 'Published' state.

In order to create a new document in ProjectWise, you can either click on 'New Document' to create the document directly in ProjectWise or Drag'n Drop the document into ProjectWise for a given project.

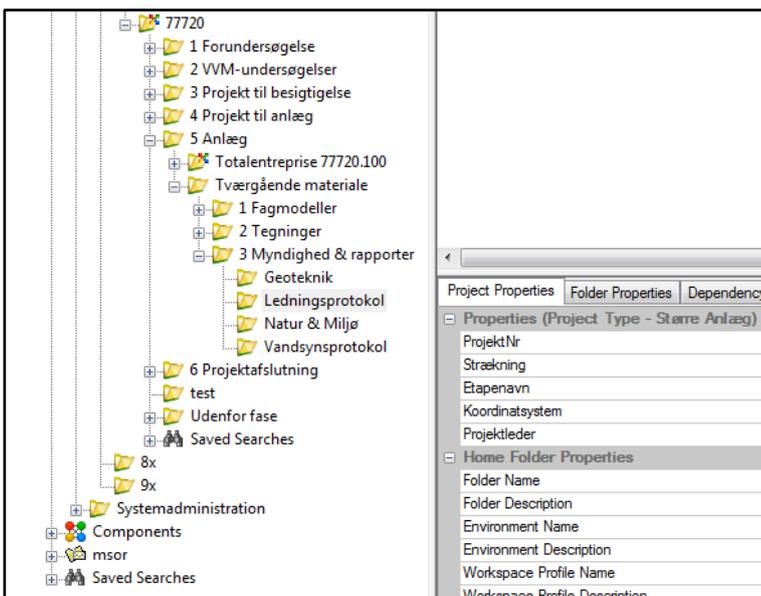


When you have performed one of these actions, the following window opens:



Select 'Advanced Wizard' to give the document the right file name and to ensure that the document attributes are filled in correctly.

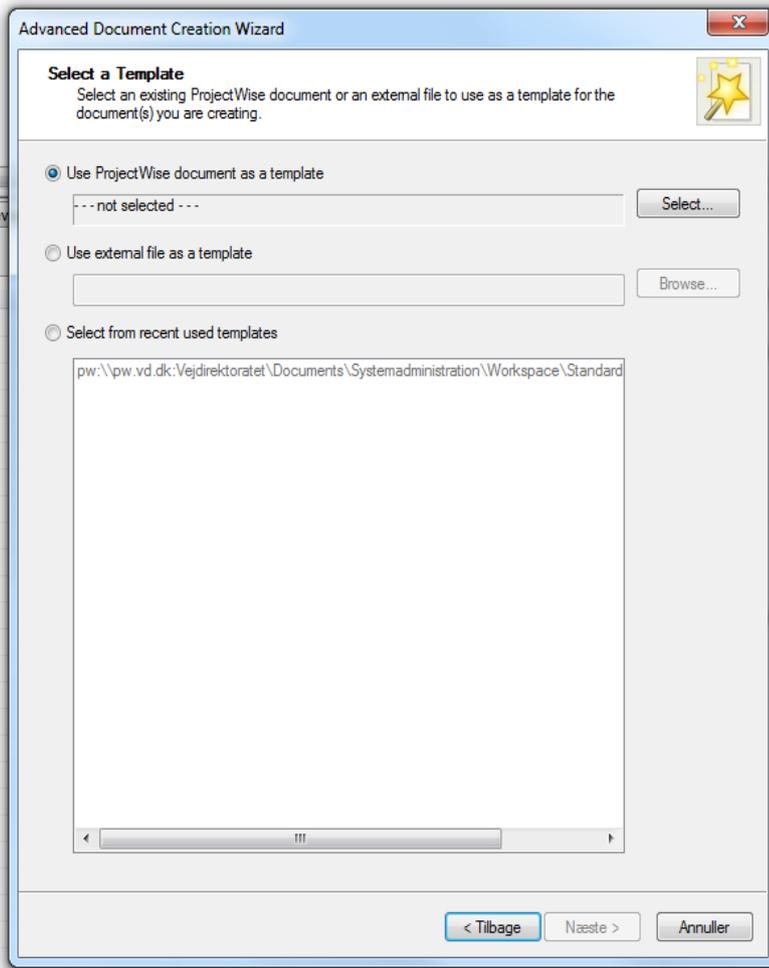
Click on 'næste' (next)



Confirm the location of the document and click on 'næste' (next)

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If the document has not been Drag'n Dropped into ProjectWise, you have to select a 'Template' (seed file).

Select a 'Template' which has the same extension as the file you want to create.

If, for instance, you want to create a Word file, select a 'Template' with the extension .docx, and if you want to create an Excel file, select a 'Template' with the extension .xlsx, etc.

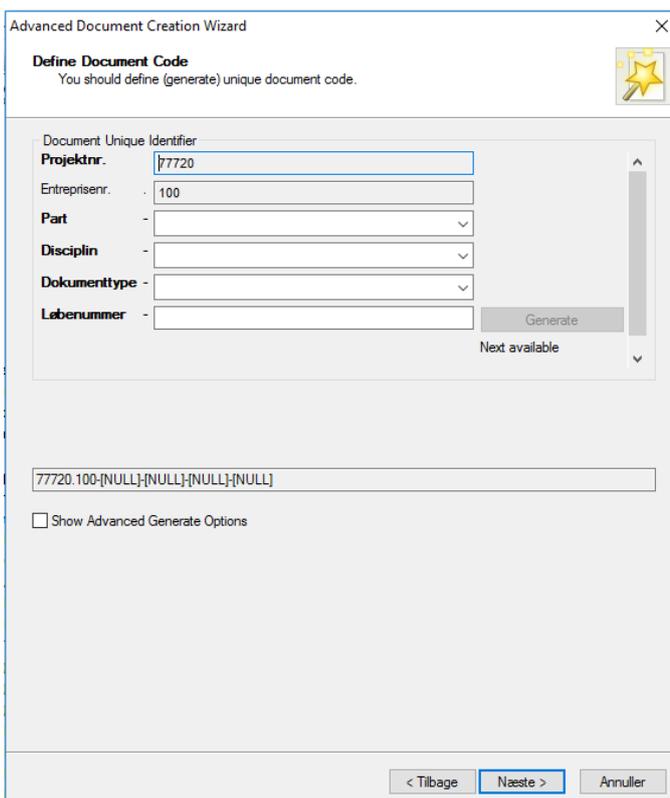
Select 'Use ProjectWise document as a template' and click 'Select'.

Browse to the following path: Vejdirektoratet -> Documents -> Templates and select the right template file.

If no template exists for the type of document you want to create, create the document outside ProjectWise and Drag'nDrop it in.

TIP: ProjectWise remembers the most recently used template files. The next time you create a new file, the most recently used template files will be listed under 'Select from recent used templates'. They can be selected so you do not have to browse to the files every time.

Click on 'næste' (next) to generate a file name.



In this window, the file name have to be filled.

The file name must be built with codes according to the following syntax:

Projektnr. Entreprisenr-Part-Disciplin-Dokumenttype-Løbenr.

'Project No.' and 'Contract no.' is automatically filled with a value.

In 'Part' select the party who creates the document.

In 'Discipline' choose the discipline that the document deals with

In 'Document type' choose which type of document is being created.

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The '**Number**' is generated when the 'Generate' button is push, making the document name unique.

Click on 'næste' (next)

Advanced Document Creation Wizard

Define Document Attributes
You should define environment specific document attributes.

Dokument **Vejdirektoratet**

Projekt nr. 77720 TEST - TEST PROJEKT

Entreprenør nr. 100 Totalentreprise

Part VD Vejdirektoratet (The Danish Road Directorate)

Disciplin XXX Generelt (General)

Dokumenttype NOTA Notat (Memo)

Labenummer 0001 Filnavn 77720.100-VD-XXX-NOTA-0001 Version v01.1

Titel i dokument Firma

Sagsbehandling

Kommenteringspakke Status

Oprettet d. Behandlet d. Kvalitetskontr. d. Afsluttet d.

Sagsopretter Sagsbehandler Kvalitetskontr. af Afsluttet af

Opdater attributter

< Tilbage Næste > Annuller

In this window, you can fill in some of the file attributes.

Some of these attributes are read-only and will be filled in automatically.

See the description of the attributes below the screen-shot and when they are to be filled in.

Note: The attributes can be filled in or edited after the document has been created.

This is done by right-clicking on the file and selecting 'Properties'. Then select the 'Attributes' tab.

Click on 'næste' (next)

Attributes for document:

- **Title in document:** Write the title of the document. Has to be filled when the file is at the '*Design*' state.
- **Company:** If the document is created by an external part, the name of the company in which this person works needs to be chosen. Has to be filled when the file is at the '*Design*' state.
- **Design package:** This attribute should only be filled in if the document is part of a specific design package. Enter the name or number of the design package. Can be filled when the file is at the '*Design*' state.

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The file name previously written has now automatically been entered in the file 'Document name' and 'File name'

Advanced Document Creation Wizard

Document Properties
Define required document properties - the name and the file name.
Optionally, you can also define document description and version string.

New document name
Wordfil

Description for the new document

New document file name
Wordfil.docx

Version

Application:
Microsoft Word

< Tilbage Næste > Annuller

If you want a description of the file, fill in the field 'Description for the new document'

Click on 'næste' (next) and again 'næste' (next) etc. until the file has been created ProjectWise.

TIP: For faster and more flexible creation of files, click on 'Tips & Tricks' in [the user manual main menu](#).

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