

# ProjectWise – Using Automated Forms

Using the new ProjectWise automated forms is simple, and requires very little effort.

Below are the steps you need to take to use the automated forms.

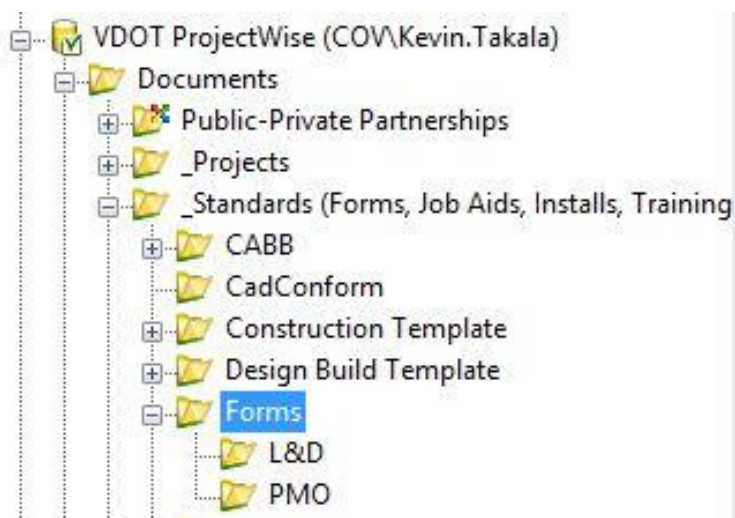
**Please read the entire document before you start using the automated forms.**

In order for these forms to work **you must be using Microsoft Office 2016 or newer**, and have the ProjectWise integration modules installed and turned on. The modules are installed and turned on by default when ProjectWise gets installed. However, if you have turned them off you will need to turn them back on.

Areas that are meant to be filled in manually will have a grey box, drop down, date picker, etc. in them. Cells that are meant to be manually filled in will have a background color of white, with the exception of the Date field at the top of the forms and a few others. All automated fields are found in the first table in the document, but some fields in the first table are not automated.

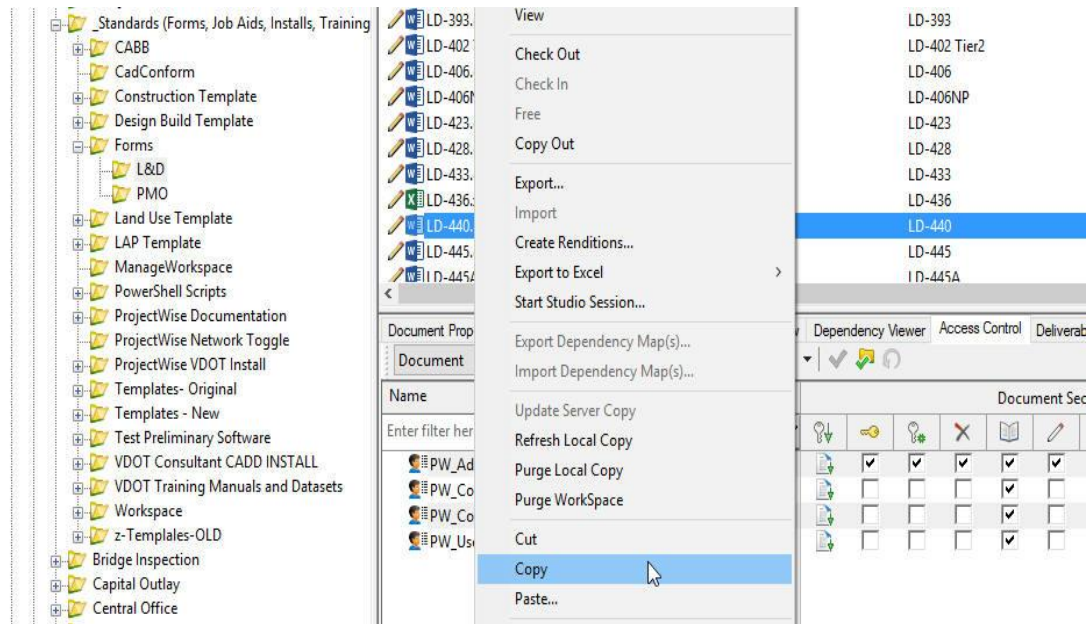
**Modifying these forms (other than areas that are meant to be filled out) is prohibited and will cause the form to be no longer valid.**

- Go to the [Forms](#) folder in ProjectWise
  - If this link doesn't work then you can find it by going to Documents\\_Standards (Forms, Job Aids, Installs, Training)\Forms in ProjectWise
- Here you will find two folders.
  - L&D
  - PMO
- Open the folder where the form you want is stored
- Select the form you wish to use

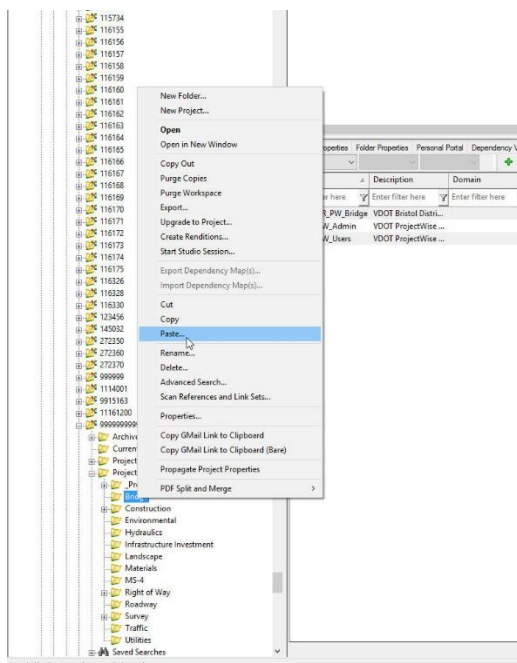


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- Right click on the form
- Select Copy

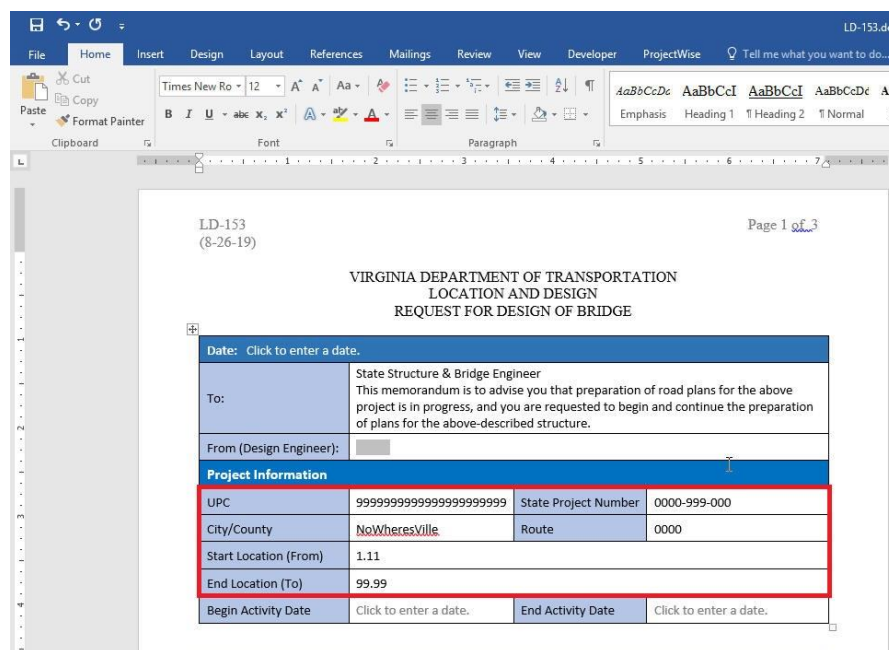


- Browse to the folder you wish to add the form to
- Right click on the folder
- Select Paste



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- A window will pop up asking ‘Do you want to copy the document(s) here?’
  - Select Yes
- The Select Wizard window will pop up next
- Select ‘No Wizard’
- Click Ok
- In order for the fields to fill in you will have to open the document for editing
  - Not as read only



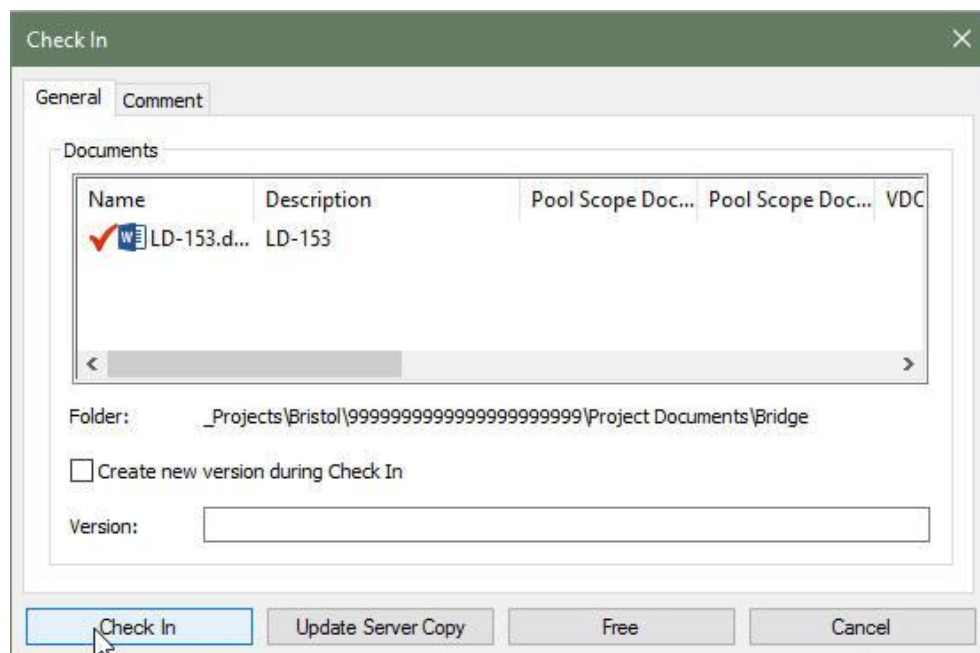
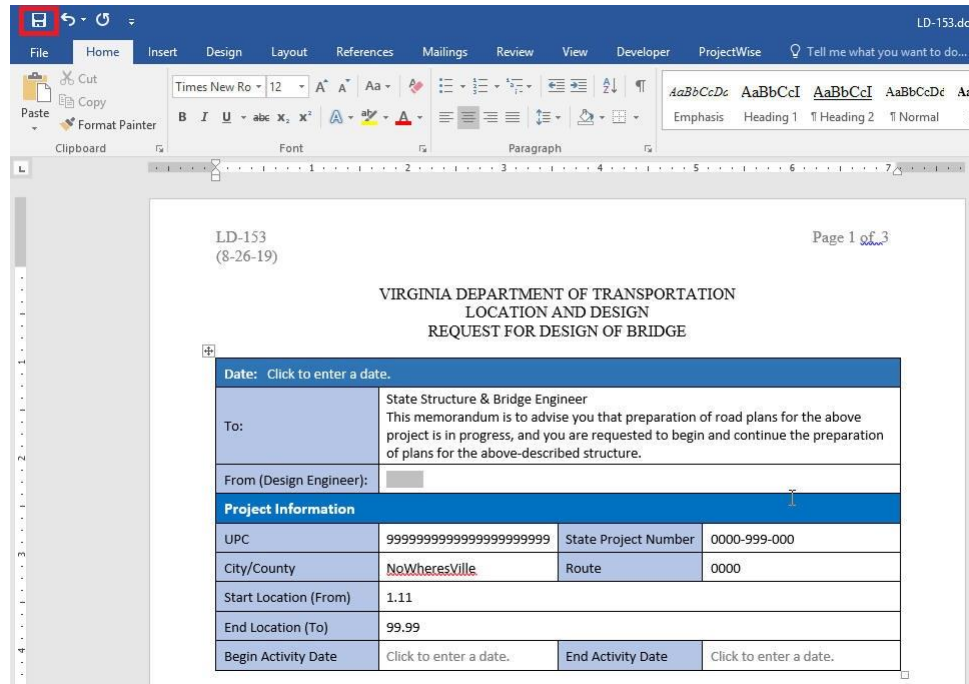
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VIRGINIA DEPARTMENT OF TRANSPORTATION  
LOCATION AND DESIGN  
REQUEST FOR DESIGN OF BRIDGE

Date:	Click to enter a date.		
To:	State Structure & Bridge Engineer This memorandum is to advise you that preparation of road plans for the above project is in progress, and you are requested to begin and continue the preparation of plans for the above-described structure.		
From (Design Engineer):			
<b>Project Information</b>			
UPC	999999999999999999999999	State Project Number	0000-999-000
City/County	NoWheresville	Route	0000
Start Location (From)	1.11		
End Location (To)	99.99		
Begin Activity Date	Click to enter a date.	End Activity Date	Click to enter a date.

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- Once the document is opened
  - Save It
  - Check it back into ProjectWise



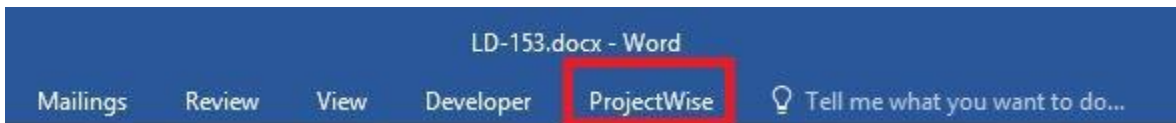
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- All of these forms are also available on the VDOT website
  - (<http://vdotforms.vdot.virginia.gov/>).
- You can download the form, drag and drop it into ProjectWise, and open it to have the fields automatically populate.
- If an automated field in the form is showing up as blank (see below image) **DO NOT** fill it in. You need to update the project properties in Projectwise or Pool, and reopen the form. ProjectWise project properties that are linked to Pool are all properties that include Pool in the name and VDOT Project Number, VDOT Project Description, VDOT Route, VDOT Project Scope, VDOT District, VDOT County-City Number, VDOT County-City Name, VDOT Project Manager, VDOT PMO Project Template Type, and VDOT SYP Functional Class. To update the properties that are linked to Pool you need to update the field in Pool, and it will be updated in ProjectWise the next day. Even if a field isn't coming in you can still fill out the rest of the form and save it. Then once the property is updated in ProjectWise all you have to do is reopen the document, save it, check it back in, and the field will be filled in.

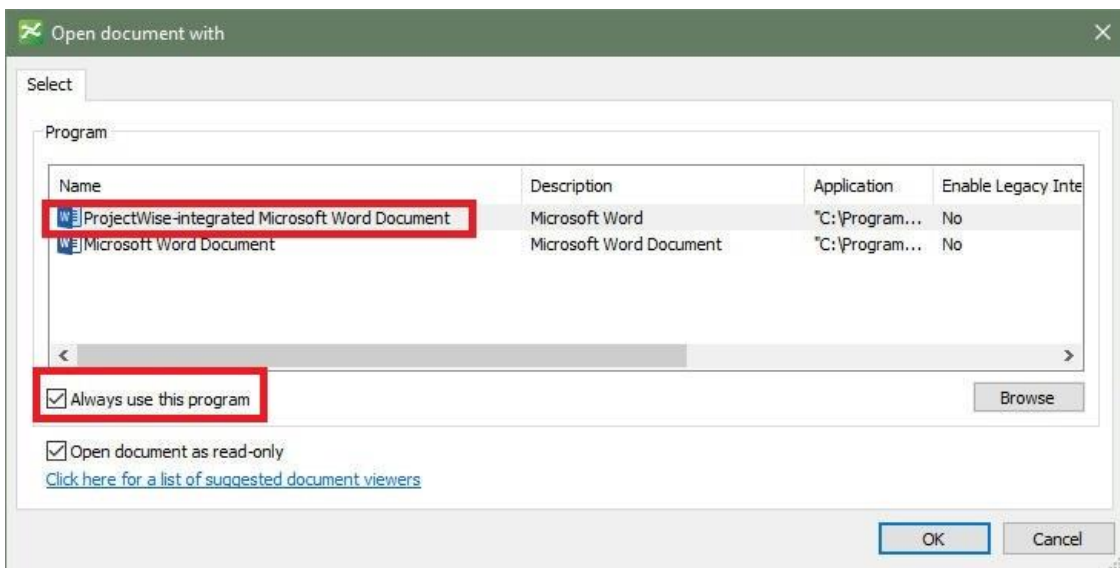
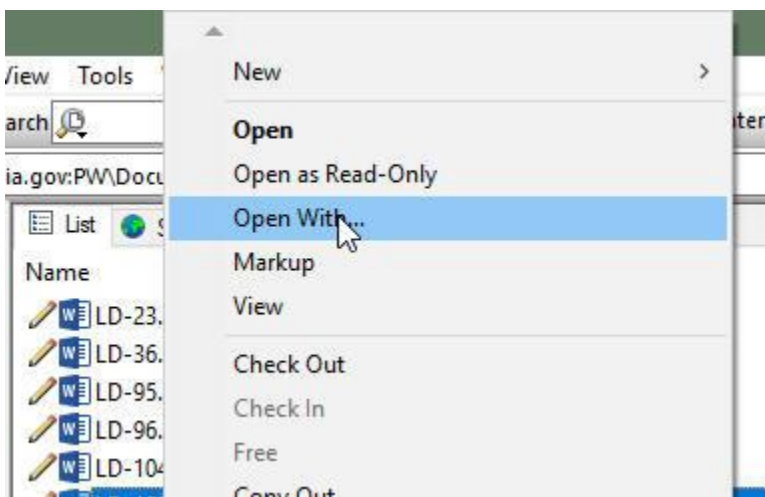
<b>Date:</b> Click to enter a date.			
<b>To:</b>	State Structure & Bridge Engineer This memorandum is to advise you that preparation of road plans for the above project is in progress, and you are requested to begin and continue the preparation of plans for the above-described structure.		
<b>From (Design Engineer):</b>	<input type="text"/>		
<b>Project Information</b>			
<b>UPC</b>	99999999999999999999999999999999	<b>State Project Number</b>	0000-999-000
<b>City/County</b>	NoWheresVille	<b>Route</b>	<input type="text"/>
<b>Start Location (From)</b>	1.11		
<b>End Location (To)</b>	99.99		
<b>Begin Activity Date</b>	Click to enter a date.	<b>End Activity Date</b>	Click to enter a date.

- **DO NOT** copy and paste forms from one project to the other. The project properties from the first project will come over with the form, and be incorrect when you open the form in the new project.
- If the automated forms don't appear to be working first check to make sure that the ProjectWise Integration tools are properly installed. You can do this by looking for the ProjectWise tab at the top of the Word Document.

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- If the automated forms don't appear to be working, and the ProjectWise Integration modules are installed try right clicking the document and selecting Open With... A window showing options for programs to open the file with. Make sure to select the ProjectWise-Integrated Microsoft Word Document option, check the box that says Always use this program, and click Ok.



## ProjectWise – Using Automated Forms



If you experience problems with a form please contact CADD Support at 804-786-1280, or by email at [caddsupport@vdot.virginia.gov](mailto:caddsupport@vdot.virginia.gov).

For any other form questions or comments please contact George Rogerson at 804-786-8287, or by email at [george.rogerson@vdot.virginia.gov](mailto:george.rogerson@vdot.virginia.gov)