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SUBJECT: Bentley ProjectWise as the Corporate Tool for Engineering Data Management in USACE

CATEGORY: Directive

1. References:

a. Engineering and Construction Bulletin (ECB) 2006-09, Deployment of Bentley ProjectWise as the Corporate Tool for Virtual Design and Engineering Data Management, Archived

b. Technical Excellence Network (TEN) website,
<https://apps.usace.army.mil/sites/TEN/SitePages/ProjectWise.aspx>

c. CAD/BIM Technology Center website, <https://cadbimcenter.erdc.dren.mil/Training>

2. Definitions. For the purposes of this criterion, “Engineering Data Management” refers to the use of a document management system to manage files and associated metadata related to all aspects of USACE’s engineering mission.

3. Purpose. This directive renews and updates the requirements set forth in ECB 2006-09, “Bentley ProjectWise as the Corporate Tool for Virtual Design and Engineering Data Management in USACE.” The use of ProjectWise in document management processes for engineering are required as described herein.

4. Background. To support mission goals, USACE must effectively collaborate both physically and virtually. Effective collaboration requires the use of common tools and procedures to share resources and data across the entire organization. In 2006, ProjectWise was established as the standard USACE tool to enable virtual design, providing robust document management controls, network utilization benefits, and quality control and assurance capabilities. Today, ProjectWise is a proven document management solution used across USACE; its use has expanded beyond virtual design teams and has become a critical component of the success of USACE’s Engineering and Construction mission and Knowledge Management activities.

5. Applicability. The requirements set forth in this ECB are effective immediately and apply to all USACE Commands (i.e. all Districts, MSCs, and Centers).

6. Policy and Implementation.

- a. ProjectWise will be used to manage and store all applicable documents developed in support of the USACE engineering mission, including but not limited to design files used in drawing generation, design calculations, design/decision documentation, and correspondence. These managed, native format files can be used to create record documents to be consumed by the appropriate electronic document and records management system (EDRMS).
- b. A minimum set of metadata, based on the ProjectWise Collaboration Model (PCM) and any local metadata standards, is required for all documents. The required metadata for all documents in any schema will include a unique ID linking the document to a particular project, program, or system, and a document type identifying the document's purpose.
- c. All ProjectWise installations will be minimally configured to include the following:
 - (1) All integration servers facilitating virtual teaming among districts will be connected and provide file caching via the servers' dmskrnl.cfg files.
 - (2) Audit trail will be enabled and configured at a minimum to record the creation, modification, and/or deletion of any file or folder.
 - (3) Each user's ProjectWise working folders shall reside on their local workstation under their user profile, e.g. c:\Users\\$user.name\$\My Documents\{Datasource_Name}*.
- d. Information and links to the PCM, customizations, deployments, and documentation can be found on the Technical Excellence Network (TEN) site for ProjectWise (ref 1.b).
- e. ProjectWise server and client software is available under the USACE Enterprise License Subscription (ELS) with Bentley Systems. To request training and implementation support for ProjectWise, go to the CAD/BIM Center's Training page (ref 1.c).

7. Update. All new requirements will be included in the next appropriate policy document update.

8. Point of Contact. HQUSACE point of contact for this ECB is Jason Fairchild, CECW-CE, (202) 761-1898.

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