



A13 - ProjectWise Insights

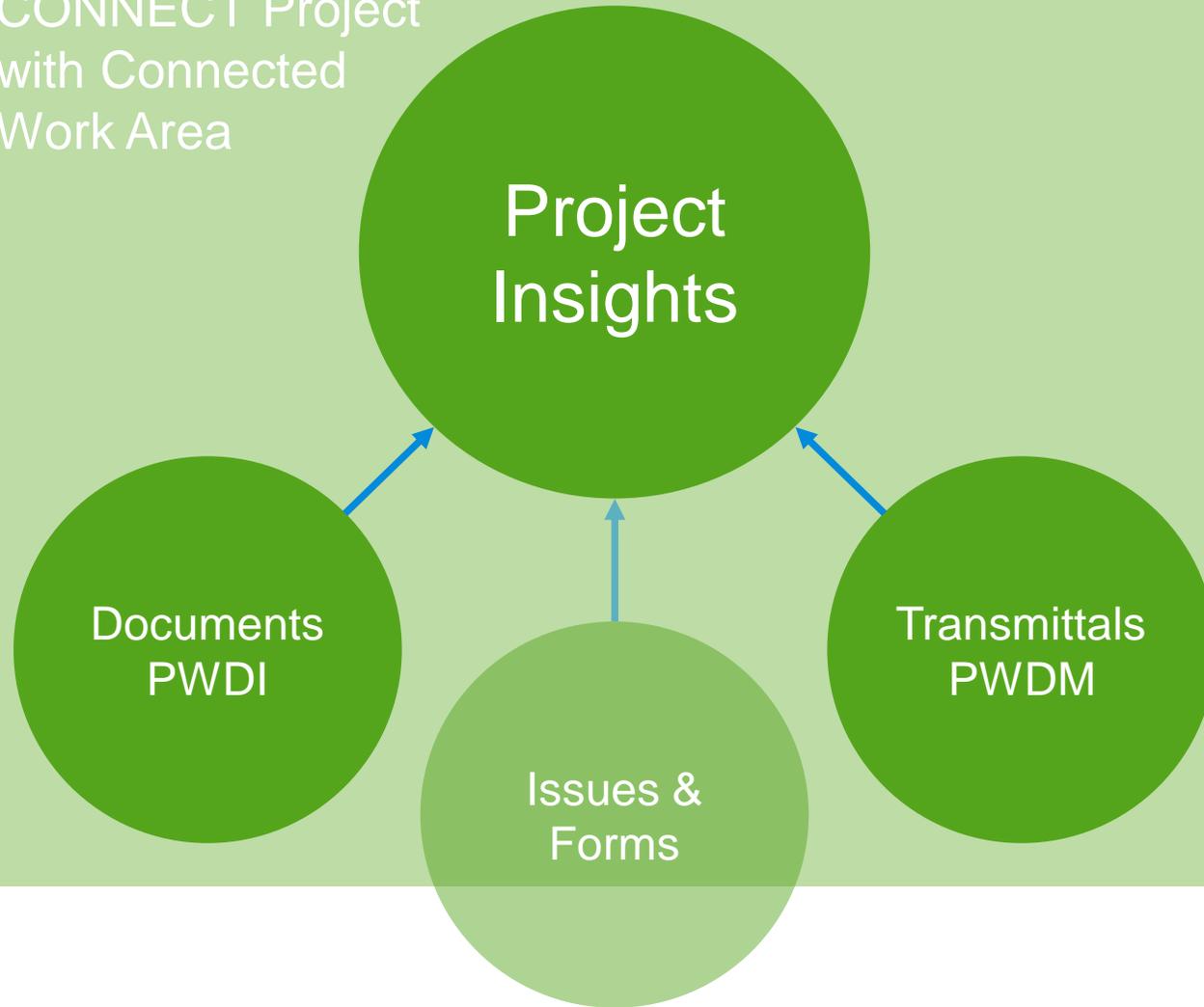
Dan Cutler – Application Engineer, Bentley Systems

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Advancing Infrastructure

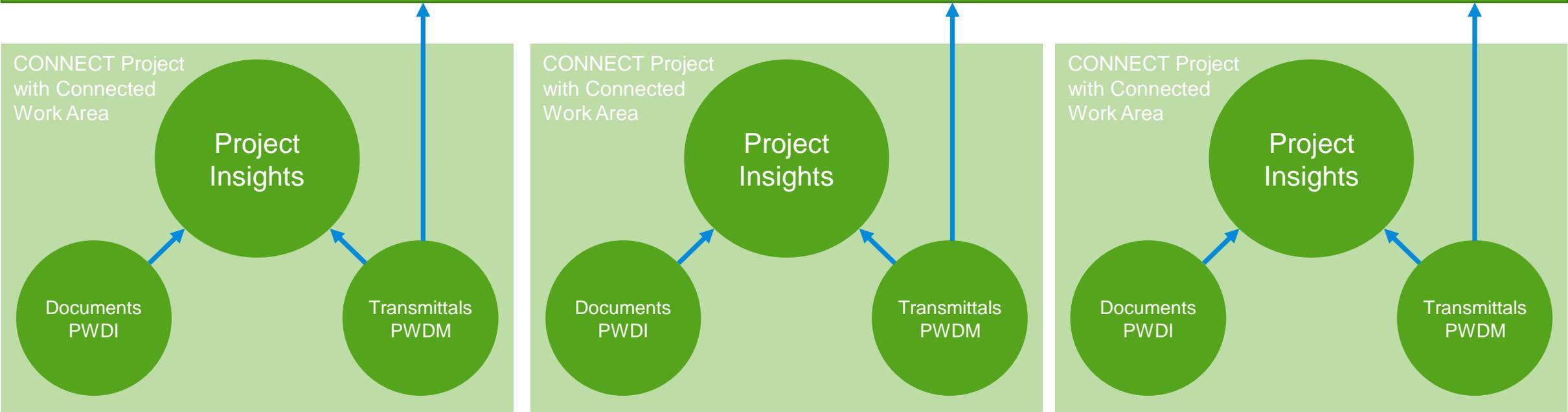
Agenda

- What is Project Insights and Portfolio Insights?
- Configuring Project Insights for:
 - Work Area Documents (PWDI)
 - Deliverables Management (PWDM)
 - Schedule (imported via PWDI)
- Customising dashboards in Insights
- Power BI Connector

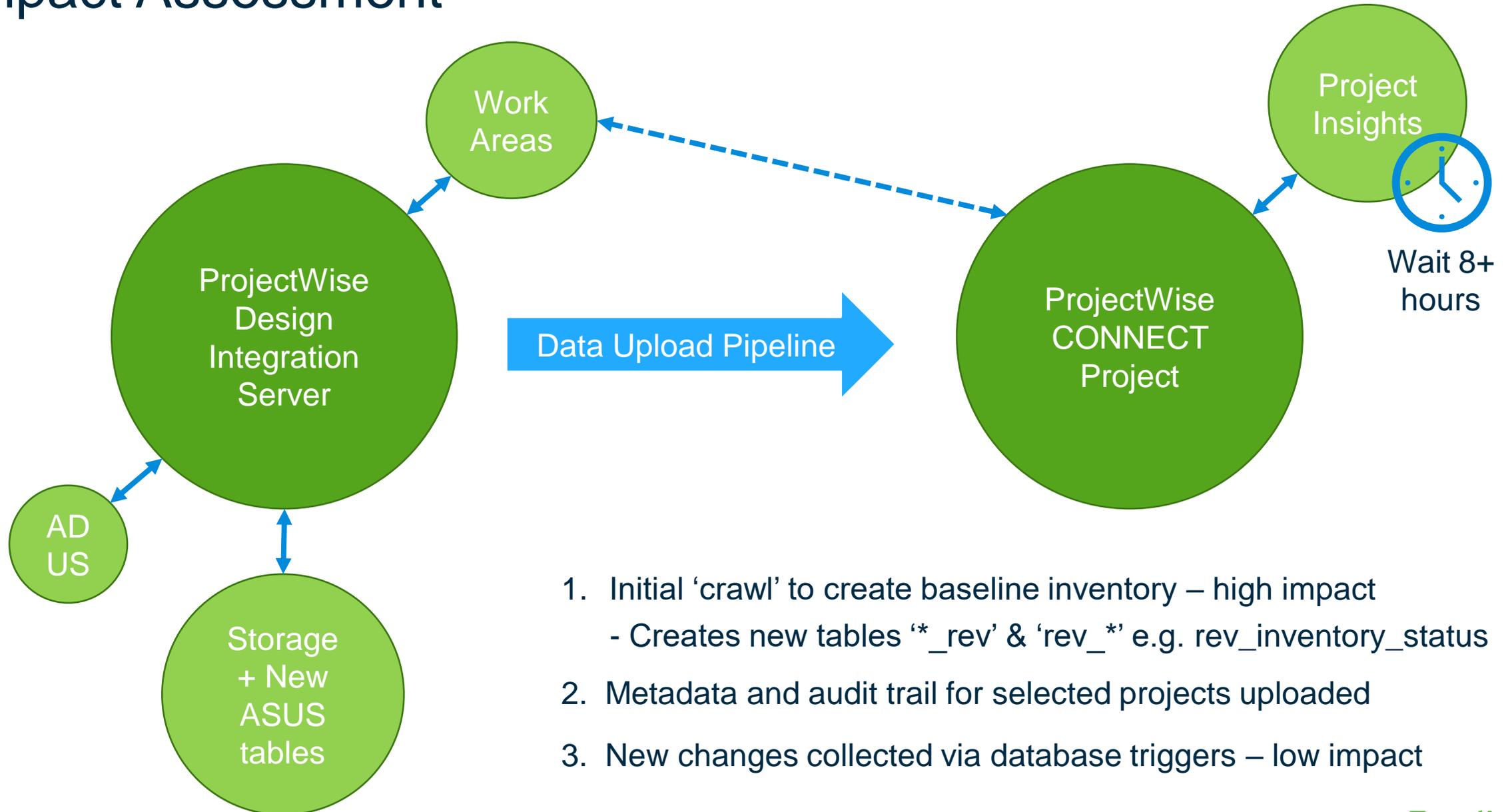
CONNECT Project
with Connected
Work Area



Portfolio Insights



Impact Assessment



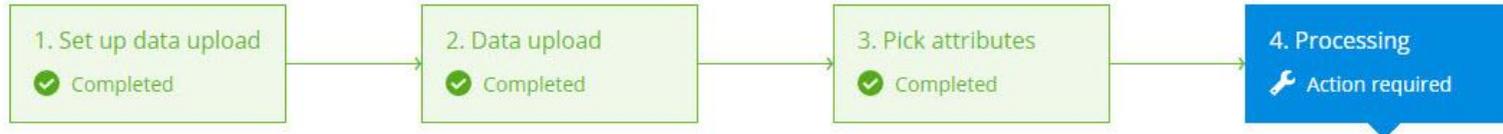
1. Initial 'crawl' to create baseline inventory – high impact
 - Creates new tables '*_rev' & 'rev_*' e.g. rev_inventory_status
2. Metadata and audit trail for selected projects uploaded
3. New changes collected via database triggers – low impact



Overview

- By discipline
- Suitability
- Location
- Type
- Discipline
- Approver
- Designer
- Approval trend
- +

Step 4: Dashboards are being built



i We could not extract any values from the configured attributes. Possible reasons why:

- You have no ProjectWise documents yet. If so, wait for ProjectWise documents to be created.
- ProjectWise attributes are not configured correctly. If so, please make sure correct attributes are selected in the settings.

For more information about how to configure your data please [see the documentation](#).

[Configure](#)

It will be automatically detected if a step was performed and move to the next step in the process.

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Report updated 4 hours ago

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Data collection setup
Pick ProjectWise attributes
Filter out data
Refine values for readability
PWDM settings
Other Settings
Organize tabs
Delete custom tabs
Discipline lanes
Import settings
Turn off data collection

< Back to dashboard

Data collection configuration overview



Pick ProjectWise attributes

- Required -

Select which ProjectWise document attributes hold values to be used for grouping & counting PW documents (by Discipline, Location, etc.)



Filter out data

- Recommended -

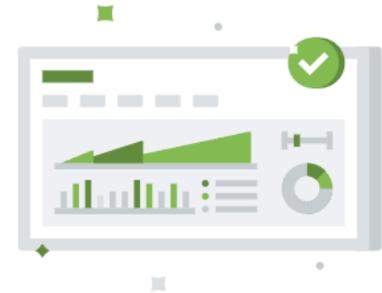
Declutter your Dashboards by focusing on the most relevant data



Refine values for readability

- Optional -

Refine & cleanse attribute values to improve data readability in dashboards (includes value substitution, values merging, etc.)



Organize tabs

- Optional -

Choose which tabs to see in the dashboard, reorder them or rename to match project naming conventions

Configure settings

Import Settings

Best Practice Configuration Guidelines

Suitability / Design Status: ?

Location: ?

Sublocation: ?

rev

- RV_REV_8
- RV_REV_9
- RV_REV_C
- Rej/Rev By
- Reject/Revision Reason
- Rejected/Revised Date
- Rev.Ver**
- Revision Date
- Revision Note

Drawing and Model Attributes

Asset/Project	<input type="text"/>	<input type="text"/>
Originator	<input type="text"/>	<input type="text"/>
Zone/Asset	<input type="text"/>	<input type="text"/>
Level/Location	<input type="text"/>	<input type="text"/>
Type	<input type="text"/>	<input type="text"/>
Role	<input type="text"/>	<input type="text"/>
File Number	<input type="text"/>	<input type="text"/>
Title *	<input type="text"/>	<input type="text"/>
Rev.Ver	<input type="text"/>	<input type="text"/>
Revision Note *	<input type="text"/>	<input type="text"/>
Suitability Code*	<input type="text"/>	<input type="text"/>
Drawn By	<input type="text"/>	<input type="text"/>
Checked By	<input type="text"/>	<input type="text"/>
Approved By	<input type="text"/>	<input type="text"/>
Authorised By	<input type="text"/>	<input type="text"/>
Rei/Rev By	<input type="text"/>	<input type="text"/>

RV_REV_1 Properties

General Value Editing Extra Values Interface

Identification

Name: RV_REV_1

Attribute role: Ordinary attribute

Attribute value

Unique Access: Read-only

Required Editable if final

Clear Attribute value when:

Copied inside document

Copied inside environment

Copied or moved from other environment

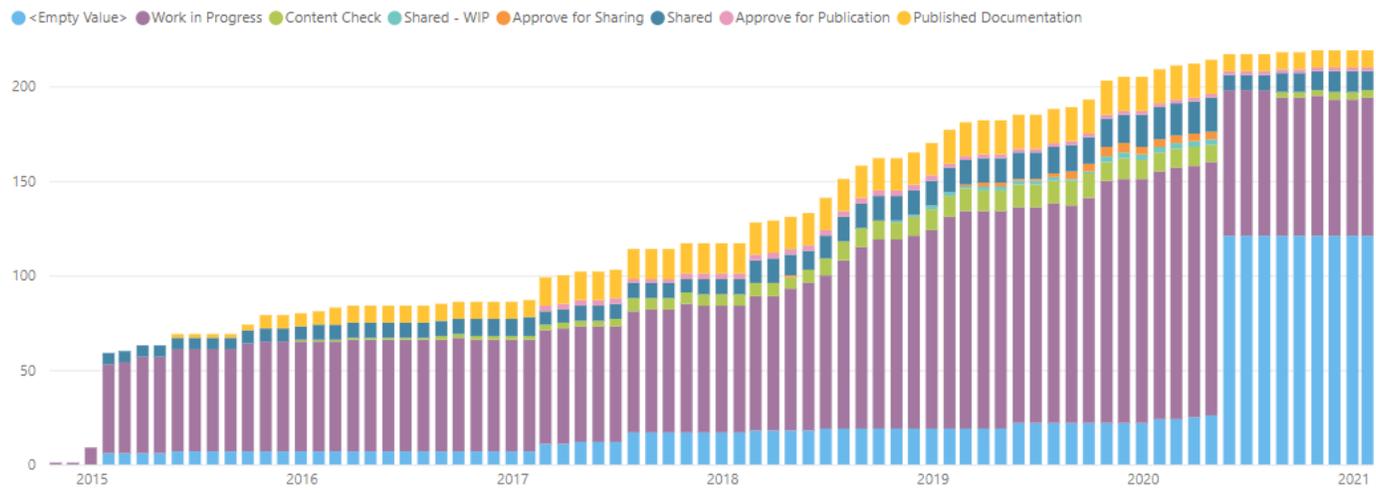
OK Cancel Apply

- decide-pwce-eu-09 (Dan.Cutler@bentley.c ^
- Coordinate Systems
- Symbologies
- Background Maps
- Spatial Metadata Scanners
- Renditions
- Rules Engine
- Messaging Services
- WorkSpaces
- Work Area Types
- Applications
- Departments
- States
- Workflows
- Storage areas
- Views
- File Streaming
- Environments
 - Document Attributes
 - Attributes
 - Attribute layout
 - Document Attributes
 - 'Attributes' tab
 - 'More Attributes' tab
 - Revision Attributes
 - Document code restrictions
 - Lookup Table - Document Code At
 - Lookup Table - General Attributes
 - Lookup Table - PW User Attributes
 - Rendition Attributes
- Interfaces

Overview PWDI activity Tree By discipline Suitability Approval trend Incoming delive... Submittal trends Page 2

PW1

Document count over time shown by workflow state



Select a date range to filter

29/05/2014 26/01/2021

Select document type to filter

All

Select document subtype to filter

All

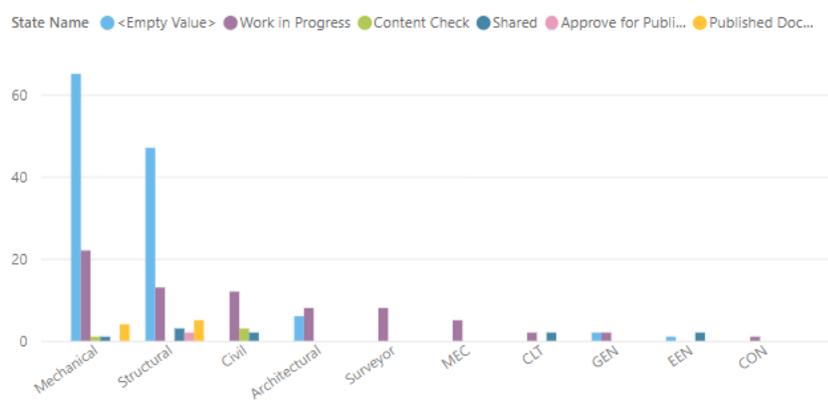
Select workflow state to filter

All

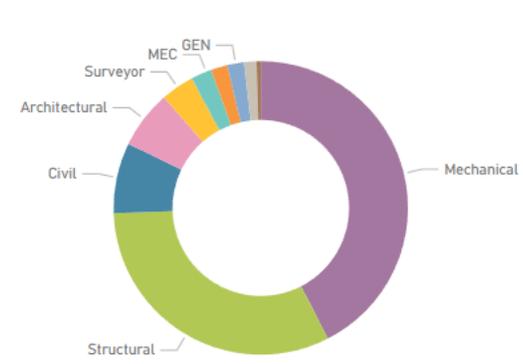
Select a discipline to filter

All

Present document count by discipline and state name



Present document count by discipline



Present Document Count

Present Document Count	Type
134	M3
40	DR
28	M2
8	MR
5	RP
4	CO
219	

Deliverables Management Setup

Home Bentley Systems Inc Assets Projects EMEA-DEMO-BLDG-BPR-001 EMEA-DEMO-BLDG-BPR-PWBS1192 42 ? Dan Cutler DC

ProjectWise Project Insights | Settings > PWDM Settings

Data collection setup

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- Other Settings
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<Back to dashboard

ProjectWise Deliverables Management Settings

Select a Deliverables Management attribute that contains Document Code for transmittal and submittal documents. The Document Code value is a unique document identifier that stays the same in all issued versions of the same document.

[Why this is needed and how it works?](#) ▾

If you don't want to see two versions of the same document counted in the dashboard as completely separate deliverable documents, we need your help identifying a common property (like Document Code) that stays constant throughout all document versions.

Having the ability to recognize different versions of the same document allows Project Insights to see what version is the most recent and display in dashboard the most current acceptance status of each deliverable document.

Extract unique identifier from filename (default option)
Example: A filename "SC1-SFT-V1M3-A-S1-V12-P02.pdf" would result in "SC1-SFT-V1M3-A-S1" used as a document code

[More information](#) ▾

Filename is transformed this way:

- File extension is removed
- Trailing document version/revision is removed
- The remainder is used as document code

Version/revision is recognized when written in filename as (case insensitive):

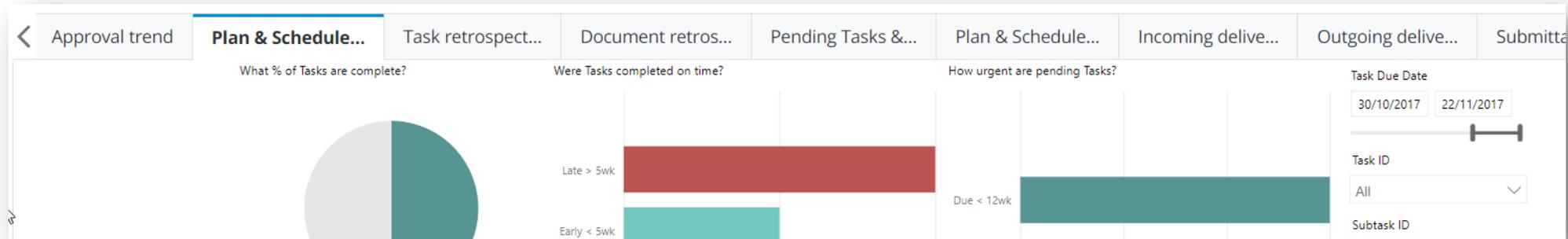
- "-v1", "-V12", ".v124", ".v12"
- ".p01", ".p01", "-p01"
- "-v12-p02"

Use specific attribute

Save changes It takes approximately 8 hours to update dashboards after changes in the configuration.

Plan & Schedule Setup

It's now possible to report on project progress against a plan or schedule, but you will need to do some work.



- Export data from planning software
- Import to database
- Create custom attributes

Plan & Schedule – Useful Links and Information

[Planning and Scheduling tabs help](#)

[Export from P6](#) (you can use other planning tools)

[Import to SQL](#)

[Create Lookup tables in ProjectWise](#)

Let us know if you need us, we're here to help!

Creating and Editing Dashboards

The screenshot displays the Bentley ProjectWise Project Insights dashboard editor. At the top, the navigation bar includes 'Home', 'Bentley Systems Inc', 'Assets', 'Projects', and a dropdown menu for 'EMEA-DEMO-BLDG-BPR-001' and 'EMEA-DEMO-BLDG-BPR-PWBS1192'. The user 'Dan Cutler' is logged in. The main dashboard area features a 'Stop editing' button and a toolbar with options like 'File', 'View', 'Explore', 'Text box', 'Shapes', 'Buttons', 'Visual interactions', 'Refresh', 'Duplicate this page', and 'Save'. The central visualization is a treemap chart titled 'Present Document Count' with a total of 63. It is filtered by 'Discipline: Civil', 'Workflow: Models', 'State Name: Work in Progress', 'Designer: ...', and 'Approver: ...'. The chart shows a hierarchy: 'Present Document Count' (63) branches into 'Architectural' (2), 'Civil' (2), 'EEN' (1), 'Mechanical' (29), and 'Structural' (26). 'Civil' further branches into 'Models' (2), which then branches into 'Content Check' (1) and 'Shared' (1). Below the chart are two empty placeholder boxes for 'Discipline and State Name'. The right sidebar contains 'Visualizations' and 'Fields' sections. The 'Fields' section includes a search bar and a list of fields such as 'PWDI Document Calc...', 'PWDI Document Mod...', 'PWDI Document Plan ...', 'PWDI Document Wor...', 'PWDI Documents', 'PWDI Project Timeline', 'PWDI Project Timelin...', 'PWDI Task Plan Deltas', 'PWDI Tasks', 'PWDM Project Date R...', 'PWDM Project Date R...', 'PWDM Submittal Deli...', 'PWDM Submittal Deli...', 'PWDM Submittal Deli...', 'PWDM Submittal Dist...', 'PWDM Submittal Doc...', 'PWDM Submittal Pac...', 'PWDM Submittal Pac...', and 'PWDM Submittal Pac...'. The bottom of the dashboard shows 'Report updated 8 hours ago', copyright information for Bentley Systems, and a 'Feedback' button.

Power BI Connector

- Use your ProjectWise data along with other data sources
- Full power of Power BI to customise dashboards for your business
- [Power BI Connector Download](#)
- [Sample Report](#)