

# Understanding ProjectWise Audit Trails

## Audit Trail Entries:

Every action in ProjectWise, against a document, will write an entry to the document's audit trail. An integrated application will also create audit trail entries for **some** actions that occur within the integrated application – typically, opening, exiting, and making external references to other documents in ProjectWise.

Audit trail entries record information about the date and time a document was accessed and whether or not the document was changed (internal structure, not the file size) while it was accessed. An audit trail entry will record the user name and description of the individual accessing the document and will record any manually input comments.

Audit trail entries cannot specify which application was used to edit a document. It cannot specify what was changed inside the document.

## SET UP and USE AUDIT TRAIL

By default, the audit trail displays only the last 30 days of information and does not display all columns of information. Take a moment to set up your Audit Trail preferences. Your preferences affect the columns of information that may be saved to a report.

### Set up:

In ProjectWise, open the Properties of a document and select the Audit Trail tab. Click the [Customize...] button. The Customize Report dialog opens and has six tabs – configure each as follows:

Objects: no change

Actions: check the box "Show all actions" (should already be checked)

Users: check the box "Show all users" (should already be checked)

Date: set the period to "anytime" – it is here that you can configure your audit trail to look only at a specific time frame.

Output Columns: check the box next to "User Description" on the left side; move it up on the right side so that it is below "User Name". User Name = UserID, User Description = user's name

Sorting and Grouping: ensure that Sort by is set to Date/Time and that "Ascending" is NOT checked.

### Use:

Select a document in ProjectWise and open the Properties. Select the Audit Trail tab and choose Save As... to save the audit trail to an HTML file. This file may be opened in an internet browser for quick searches or by using Excel to perform filtering, sorting or grouping.

Note about DGN reference attachments: When a master (parent) file is opened, all reference attachments are copied out to the local ProjectWise working directory. An audit trail entry of "Copied Out" can mean that the DGN file was opened read-only and can also indicate that the DGN file was copied out because the parent file was opened.

## MICROSTATION and REFERENCE ATTACHMENTS

MicroStation Command(s)	Audit Trail for Master file   Additional Data	Audit Trail for Reference
File>Open	Checked out	n/a
File>Exit	Checked in   Copy left (if Check In selected on ProjectWise dialog and edits made to the file contents - at minimum Save Settings) Checked in   Copy left; File not changed (if Check In selected on ProjectWise dialog and no edits were made) Freed (if Free selected; edits would be unknown and in the recycle bin)	n/a
Attach Reference	1. Checked out ( <i>opened master in MicroStation</i> )	No entry

	<ol style="list-style-type: none"> <li>2. Checked in   Copy left (<i>exited master and checked in</i>)</li> <li>3. Set formed</li> <li>4. Member added   name of reference in Additional Data</li> </ol>	
<b>Detach</b> Reference	<ol style="list-style-type: none"> <li>1. Member removed   name of reference in Additional Data</li> </ol>	No entry
<b>Activate</b> Reference Move Element in Ref Deactivate Reference	<ol style="list-style-type: none"> <li>1. Checked out (<i>opened master in MicroStation</i>)</li> <li>2. Checked in   Copy left; File not changed (<i>exited master and checked in</i>)</li> </ol>	<ol style="list-style-type: none"> <li>1. Checked out</li> <li>2. Checked in   Copy left</li> </ol>
<b>Exchange</b> Reference Alert: Check out document? Check In Use Back Arrow Alert: Check out document? Check In Exit Check In	<ol style="list-style-type: none"> <li>1. Checked out (<i>opened master in MicroStation</i>)</li> <li>2. Checked in   Copy left; File not changed (<i>exchanged and checked in</i>)</li> <li>3. Checked out (<i>re-opened master in MicroStation</i>)</li> <li>4. Checked in   Copy left; File not changed (<i>exited master and checked in</i>)</li> </ol>	<ol style="list-style-type: none"> <li>1. Checked out</li> <li>2. Checked in   Copy left; File not changed</li> </ol>

## PROJECTWISE COMMANDS

ProjectWise Explorer Command	Audit Trail for Action Name	Audit Trail for Comments	Audit Trail for Additional Data
Right-click <b>Check Out</b>	Checked out	No entry	No entry
Right-click <b>Check In</b>	Checked in	No entry	Copy Left
Right-click <b>Export...</b> (Send to Folder)	Sent to Folder	No Entry	No Entry
Right-click <b>Export...</b> (Export)	Exported	No Entry	Node: computer name, and Path: location of export.
Right-click <b>Import</b>	Checked in	Whatever is entered at time of import	If no changes: File not changed; Import If changes: Import
Right-click <b>Open as Read-Only</b>	Copied Out	No Entry	No entry
Right-click <b>Copy Out</b>	Copied Out	No Entry	No Entry
Right-click <b>Free</b> or Free during Exit	Freed	No Entry	No Entry
Right-click <b>View</b>	Viewed	No Entry	No Entry
Right-click <b>Modify...</b> Replace File (use original name) Replace File Content	File Replaced Checked Out Checked In	No Entry No Entry No Entry	New name - <i>originalPWname</i> No Entry Copy Left
Right-click <b>Properties...</b> <b>General tab   Advanced   Replace</b>	File Replaced Modified	No Entry No Entry	New name - <i>originalPWname</i> No Entry

Right-click <b>Add Comment</b>	User comment	Whatever is entered with date/time	No Entry
Right-click <b>Rename...</b>	Modified	No Entry	No Entry