

# PlanWell DataBridge

## Product Guide

Release 1.0

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## Installation Guide

The PlanWell DataBridge is a Windows based application. It is designed to run on one or more Windows workstations in a particular office.

Prerequisites:

Operating Systems: Windows XP, Vista

Hard Drive: At least 100 MB free space

Memory: At least 1 GB

Windows .Net Framework

Connectivity to the Prolog Database

## Configure Settings

Before you begin, you will need:

A valid UserID and password to your company PlanWell Account

The UNC path to your Prolog Database Server

An Administrators UserID and password for your Prolog Database

The name of the Prolog Database that you are going to connect to

For Prolog versions 8 and above, you will also need:

The host name of the Prolog Connect Server

A valid Prolog Connect UserID and password for the portfolio that you will be connecting to

The name of the Prolog Connect Portfolio that you will be connecting to

When the application is first run, it will launch the Configure Settings form.

This configuration form is broken down into 4 sections.

### Section 1 – PlanWell connection



Planwell Login Information

Login ID twilson \*

Password \*\*\*\*\* \*

Validate Planwell Login Information

Enter a user ID and password for your company PlanWell account. This UserID must have access rights to read and write to the company address book. When finished, you may verify your entry by selecting the [Validate PlanWell Login Information] button.

## Section 2 – Prolog Connection

Version 7.0    Version 2008

**Database Details**

Server	<input type="text" value="wrkstn02\sql2005"/>	*
Prolog Database UserID	<input type="text" value="sa"/>	*
Prolog Database Password	<input type="password" value="••••••"/>	*
Database	<input type="text" value="PM2008Sample"/>	*

In this section, you will select the major version number of your Prolog Database.

You will then enter the Server UNC name, and a valid admin UserID and password for your Prolog Database.

Enter the name of the Prolog Database which you will be synching data to and from.

Note: If you are connecting to a Prolog 7 database, you may then select the [Validate Prolog Configuration] button to verify your information.

## Section 3 – Prolog Connect configuration

This section is only required for Prolog Versions 8 or newer, and Prolog Connect must be installed prior to configuring the DataBridge.

**Prolog Connect Details**

Host	<input type="text" value="wrkstn02"/>	*
UserID	<input type="text" value="admin"/>	*
Password	<input type="password" value="•••••"/>	*
Virtual Root	<input type="text" value="/Prolog/Connect/"/>	*
Portfolio	<input type="text" value="PM2008Sample"/> <input type="button" value="Get Portfolio(s)"/>	

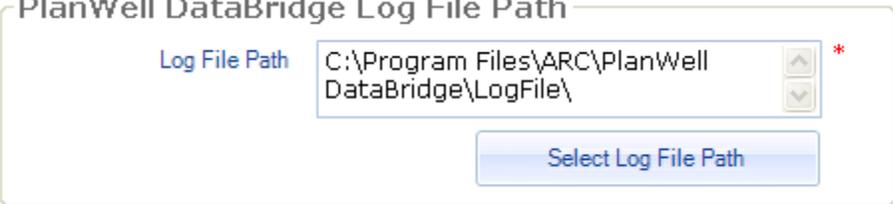
Here you will enter the HostName of the Prolog Connect server, a valid UserID and password for Prolog Connect.

The field Virtual root will default to “/Prolog/Connect/”, and should not be altered unless you have modified the default installation location for Prolog Connect.

With the first 4 fields filled in, you may then select the [Get Portfolios] button to display a list of active Prolog Connect portfolios that you may connect to. Select one from the list for the final entry in this section.

You may then click on [Validate Prolog Connection] to verify your connection information is properly configured.

## Section 4 – PlanWell DataBridge Logfile path



The screenshot shows a configuration window titled "PlanWell DataBridge Log File Path". Inside the window, there is a label "Log File Path" followed by a text input field containing the path "C:\Program Files\ARC\PlanWell DataBridge\LogFile\". To the right of the input field are two small arrow buttons (up and down) and a red asterisk. Below the input field is a blue button labeled "Select Log File Path".

This will automatically populate with the path to the DataBridge application.

If you choose, you may browse to a different folder where this logfile may be stored.

When you have finished setting all of your configuration information, you may click on [Save] to store the configuration for future use.

Note: You may enter the Configure Settings menu at any time to reconfigure your connection details for a different PlanWell account, or to select a different Prolog Database. Please review your DataBridge license prior to connecting to a different database, as certain restrictions may apply.

## Manage Contacts

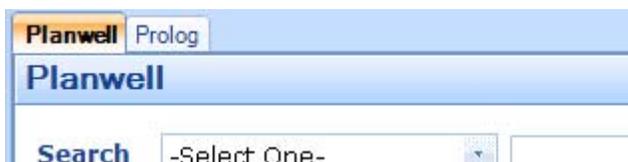
The PlanWell DataBridge will allow you to synchronize contacts between your connected PlanWell account and your connected Prolog Database.

PlanWell is a contact centric database, which stores contact records like CSI trades on a contact by contact basis. Prolog is a Company centric database which stores CSI trades and contacts on a company by company basis. The PlanWell DataBridge will handle all reformatting and consolidation requirements automatically.

When using a tool like The PlanWell DataBridge to consolidate your contacts list, it would be wise to treat one source as your Master database, where all users are added or modified, and then periodically schedule a synchronization to push the updated records to the other database. It will be left to you to decide which database you are most comfortable with keeping current.

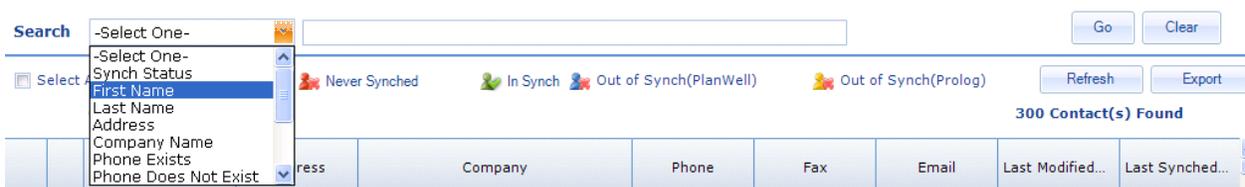
## Navigating the Contact list

The contact list is broken into two tabs. PlanWell and Prolog.



You may review the contact information which is currently stored in PlanWell by selecting the PlanWell tab. You may review the contact information which is currently in Prolog by selecting the Prolog tab. Both tabs have identical capabilities.

## Searching the contact list



You may use the available search tool to quickly locate a particular contact or group of contacts within the active list. For example, you may choose to search by first name to locate all contacts with the first name “Steve” or you may find all contacts for a given company by selecting to search by “Company Name”.

After you have entered your search criteria, select [Go] to start your search.

Clicking on the [Clear] button will reset your search criteria, and refresh the list.

### Contact Status Icons

For each contact in your list, you will see a status icon.

 **Never Synched** - This contact exists only in the currently open database.

 **In Synch** - This contact is up to date in both PlanWell and Prolog

 **Out of Synch(PlanWell)** - This contact has been synchronized in the past, but their record has been modified in Prolog. You will need to re-synch this contact with PlanWell.

 **Out of Synch(Prolog)** - This contact has been synchronized in the past, but their record has been modified in PlanWell. You will need to re-synch this contact with Prolog.

### Exporting the contact list

At any time, you may export the contacts from your currently open database by selecting the [Export] button to the right of the icon descriptions. The report will include all contacts, and will be presented in an Excel 97 format.

Also, available is a [Refresh] button, which will allow you to re-query the database for current information prior to an export. This will insure that you have the most recent information following a synchronization of contacts.

## Sorting Contact information

Each column in the Contact list is sortable. To sort a particular column, merely click on the column header. Clicking once will sort A-Z, clicking again will sort Z-A.

## Selecting contacts for synchronization

You may select all contacts or you may select them individually.

To select all, click on the “Select All” checkbox at the top of the list.



The number of total contacts selected will update in the display.

You may clear the selection, by clicking on the [Clear Selection] button.

To choose individual contacts, merely select the checkbox at the left hand side of their name on the list.

## Synchronizing Contacts

Once you have selected the contacts that you wish to synchronize, chose the [Copy to PlanWell] or [Copy to Prolog] button located at the lower right hand corner of the window. 

The synchronization process will generally take only a few seconds. This depends on the number of contacts being synched, and the speed of your connections to the PlanWell and Prolog database.

Once completed, you will be presented with a summary screen, which will detail the successfully synchronized contacts, as well as any failures which may have occurred. You may export either list for your records, or follow-up.

## Correcting Failures

If you do have contacts which failed the synchronization process, you will want to export the failures list from the summary window following your synchronization request. The reasons for failure may vary, but generally will be caused by incomplete or missing information which is considered to be mandatory by the receiving database. Each record will contain the name of the contact, along with the reason for failure, so that you may follow up by correcting the records with the missing information in the sending database, so that you may retry the synchronization.

## Manage Projects

The PlanWell DataBridge will synchronize documents and basic project information from PlanWell to Prolog. Hyperlinks for each document version will be stored with the prolog record, enabling you with the ability to reference an actual view of the document in Prolog RFI's and other correspondence. It will be important that all relevant project documents are stored in PlanWell first in order to take advantage of this capability.

## Synchronization Status

The Manage Projects window will display a list of all projects currently posted to your company's PlanWell account. As with the contact list, each project will display an icon which shows its current synchronization status.

 **Never Synched** - Indicates that the project information exists only in PlanWell.

 **In Synch** - Indicates that the project has been previously synchronized to Prolog, and that no changes have taken place to the document record in PlanWell since the last project synchronization.

 **Out of Synch** - Indicates that the project was previously synchronized to Prolog, but that changes have taken place to the documents in PlanWell since the last project synchronization.

## Search tools

The project list utilizes the same search, sort and filtering tools that were described in the Manage Contacts section of this document.

## Synchronizing Projects

To synchronize a project from PlanWell to Prolog, you may either select a project from the list and press the [Go] button, or double click on the project to launch the project preview window.

In the Project Preview window, you will be able to review the basic project details, as well as the documents, packages and issues available for synchronizing to Prolog. The files list may be sorted by column if you wish, to help you review the information.

You must select the appropriate Prolog folder which will contain the synchronized project. This selection will only be required the first time that you synchronize a project to Prolog. As well, you will need to enter the Prolog Project Sequence number. Use the same numbering scheme for the sequence number as you would for any new project that you would add to Prolog.

Prolog Project Properties

Project Status: Select Project Status (dropdown menu open with options: Select Project Status, Approved, Approved as Noted, Approximate, ASAP, Closed, Close-out, Completed)

Project Sequence: 1001

Last Modified Date: [empty field]

Synch Status: Never Synched

Issue Date	Issue Name	Discipline	Sheet Description

Once you are satisfied that the settings and project details are correct, you may start the synchronization process by clicking on the [Synch to Prolog] button at the upper right hand portion of the Project Preview Window.

Synchronization speed depends on the number of files being transferred, and the speed of your connection to PlanWell and to your Prolog Database.

In general, it should take less than a couple of minutes to synchronize a typical project. Should a failure occur during this process, a message box will detail the issues encountered so that you may take steps to correct them.

## Locating the synchronized information in Prolog

Following a project synchronization, you may need to “flash” your database connection in Prolog Manager in order to see the newly imported project data. You can do this by going to the file menu, and choosing “Close Database”. You will then want to re-open the database in order to re-read the data, at this point, your newly transferred project data should appear in the selected Prolog folder.

After you open the project, you will be able to access the documents and document packages from the Prolog menus. When an individual drawing is selected, you may preview the external hyperlink by clicking on the “Link

Views” icon  in the prolog menubar, and then choosing the external files tab. If you then click “open” the drawing will load in the PlanWell viewer.