

ProjectWise Deliverables Management Workflow

NOTE:

Organization = Company registered with Bentley

Transmittal = Data sent outside of organization (Outgoing)

RFI= Request For Information

Submittal = Data received into an organization (Incoming)

Participants = Someone assigned to a project. Can be an internal or external participant

Draft = A partially completed package that can be edited prior to being transmitted

Package = Proposed set of documents being transmitted or submitted

Reminder: The sending user issues a *Transmittal*, and the receiving user receives a *Submittal*.

External Participants – Creating/Issuing Submittals (Web Portal)

1. To access Bentley’s Web portal go to <https://connect.bentley.com/>

If you already have a Bentley account and have accepted an invitation to participate on a project:

- a. Enter your **Email Address**.
- b. Enter your **Password**.
- c. Click **Sign In**.

Bentley

Sign In
Access your Bentley Services

Email
haaziq.forney@bentley.com

Password

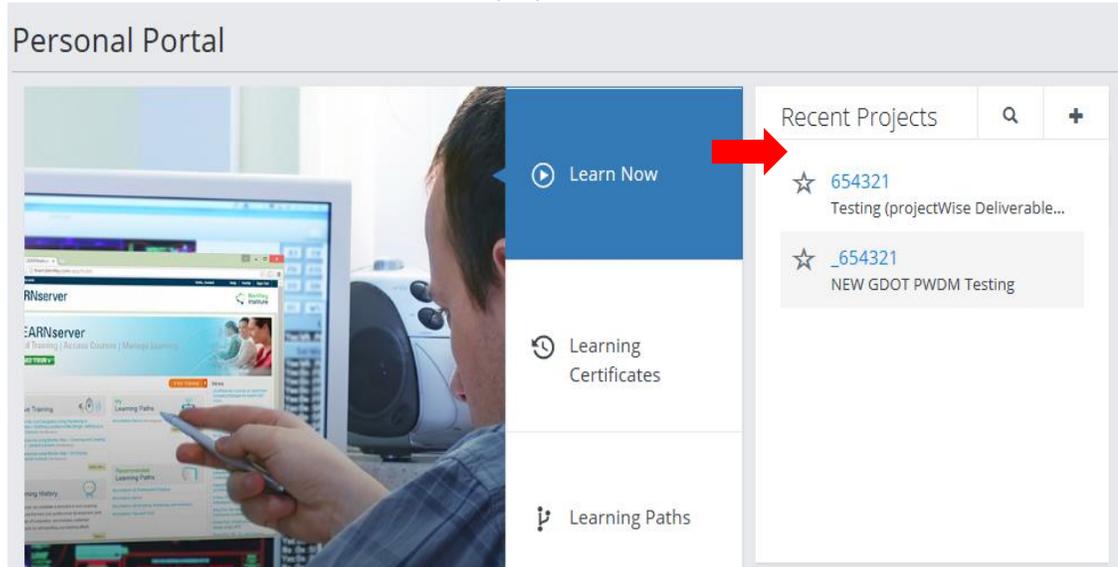
[Forgot password?](#)

Sign In

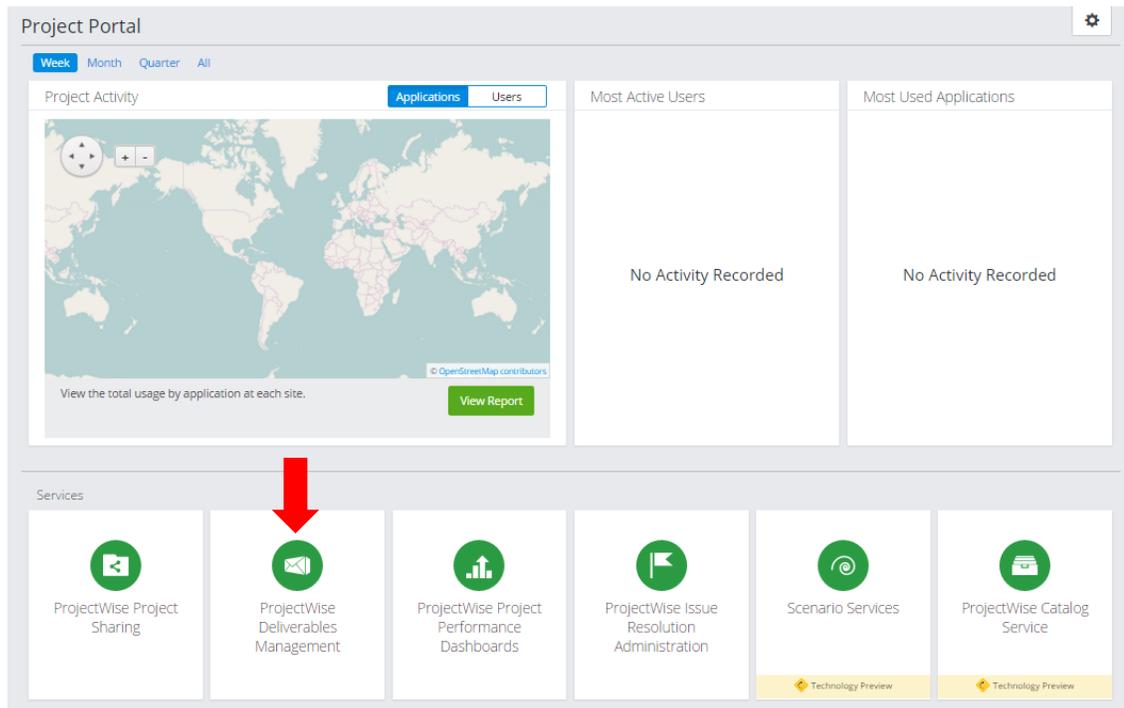
Don't have a profile? [Register](#)

2. You will be taken to the **Personal Portal**
3. From **Recent Projects**, select which CONNECTED project you want to access.

4. Click on the project to be taken to the project portal. (If the project does not appear, simply click on the Search icon to search for the project PI number.)

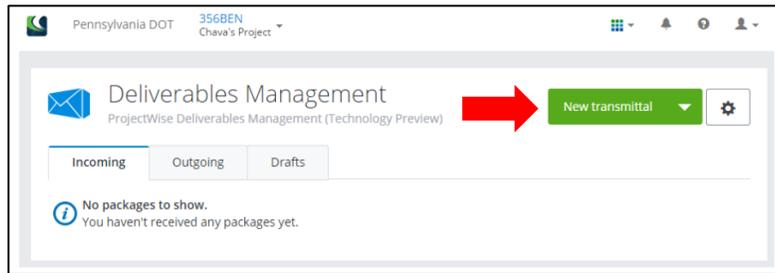


5. From the **Project Portal**, click on the **ProjectWise Deliverables Management** module.



6. You are now ready to start exchanging deliverables with project participants of this project.

7. In the Deliverables Management dashboard, click **New Transmittal**.

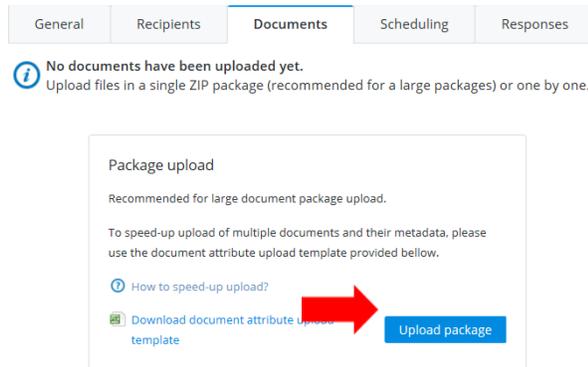


8. The transmittal draft form opens.
9. On the **General** tab, enter the following:
- Subject** – Enter brief title describing package.
 - Purpose** – Select a purpose from the pulldown list.
 - Comments** - Provide an overall comment about the package (Optional).
 - Cover Letter** – Either leave the default cover letter or select one from list (Optional).
10. On the **Recipients** tab, select which project participant you want to send this transmittal to. (Typically only one recipient is selected for an organization as a single point of contact and then they can send to other personnel within their organization for review if necessary.)
- Select **Add recipients**.
 - Select **Show Internal** to view internal recipients or **External** to view external recipients.
 - Click on a recipient, click **Add Selected**.
 - Select **Ack** or **Resp** to require recipient to acknowledge or respond or both.
 - Enter a comment for the recipient (Optional).

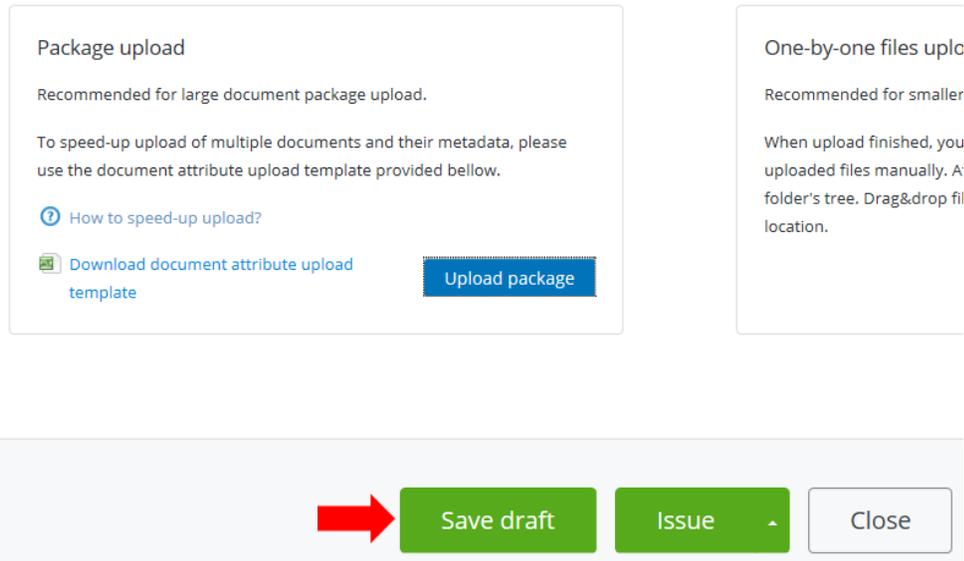
11. On the **Documents** tab,

a. **Package Upload** (through a ZIP file)

- i. Select **Upload Package** for large document package uploads with a lot of metadata. You must create a ZIP file containing the files you want to upload, including the attribute template file. You will be prompted to browse for the ZIP file.



- ii. You will be prompted to save the submittal as a draft. Click on **Save Draft**.

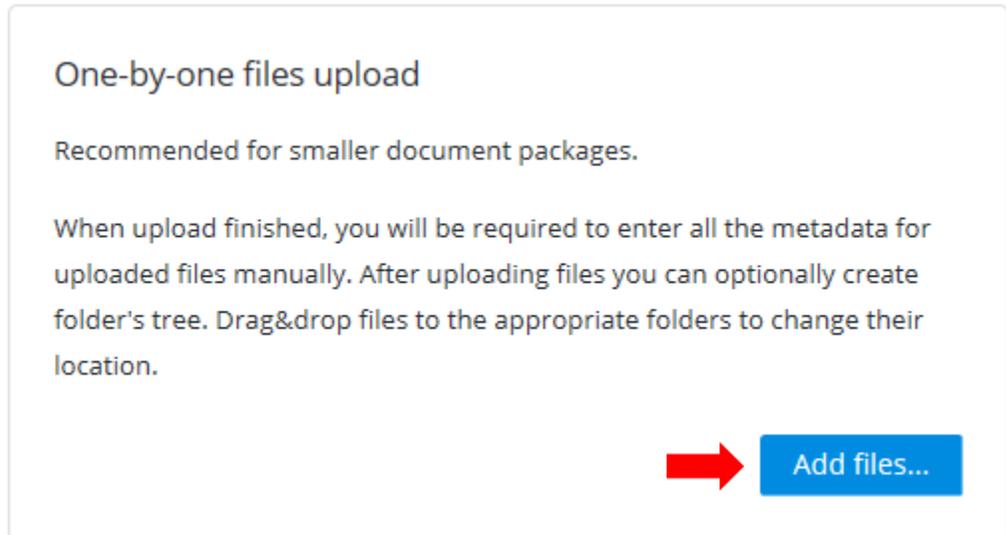


- iii. Click on **Upload Package** again.

- iv. In the *Upload Package* dialog, browse for the ZIP file containing the files you want to include in the submittal, select it, click **Open**, and then **Upload Package**.

b. **One-by-one file upload**

- i. Click on **Add files...**



- ii. Select the desired files and click on **Open**.

12. On the **Scheduling** tab,

- a. **(OPTIONAL) Select an Issue Date** – Date you want the package issued to the recipient
- i. Set reminder date to be reminded to issue the package.
- b. **Select an Acknowledge Date** – Date you want the package acknowledged by recipient
- i. Set reminder date to notify recipient to acknowledge package.
- c. **Select a Response Date** – Date you want to receive response from recipient
- i. Set reminder date to be reminded to issue package.

13. To issue transmittal package:

- a. Select **Save Draft** if your transmittal is not ready to be transmitted. This will save your transmittal and make it available for editing later.
- b. Select **Send for Review** by clicking the arrow dropdown menu next to **Issue**. This will send the transmittal for review by internal participants. The internal reviewer will receive notification and can then **Issue** the package or **Reject** it after review.
- c. Select **Issue** from the bottom of the dialogue box and then **Confirm**.