

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

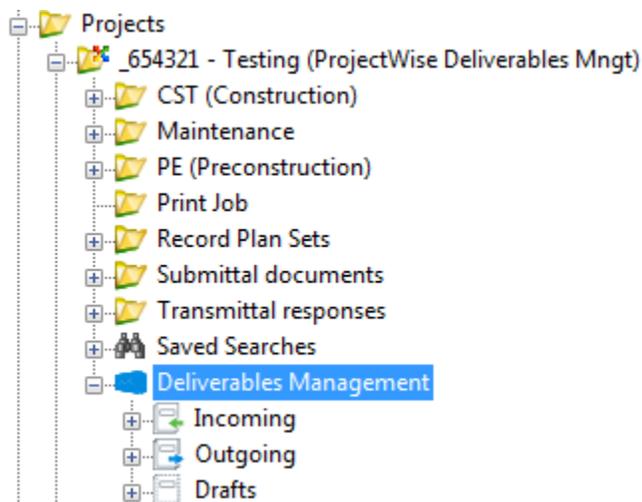
Reminder: The sending user issues a *Transmittal*, and the receiving user receives a *Submittal*.

GDOT Participants – Creating/Issuing New Transmittals

Browse to the ProjectWise folder that contains the documents to be transmitted and version the files. Right-Click on the files to be versioned select **New=>Version**. When prompted for a version name enter current date (ie: “03012016”).

NOTE: If you forget to create the new version or ever need to stop and come back to creating a transmittal later, simply click on **Save Draft** and it will be saved under *Deliverables Management\Drafts* for that project.

1. To create a new transmittal or RFI: Right-click on the **Deliverables Management** module, or right-click on the **Drafts** or **Outgoing** tabs below it, and select **New Transmittal or New RFI**.



2. On the **General** tab, enter the following:
 - a. **Subject** – Enter brief title describing package.
 - b. **Purpose** – Select a purpose from the pulldown list.

- c. **Comments** - Provide an overall comment about the package (Optional).
 - d. **Cover Letter** – Either leave the default cover letter or select one from list (Optional).
3. On the **Recipients** tab, select which internal and external project participants you want to send this transmittal to.
 - a. Select **Add recipients**.
 - b. Select **Show External**.
 - c. Click on recipient, click **Select**, click **Ok**.
 - d. Select **Ack** or **Resp** to require recipient to acknowledge or respond or both.
 - e. Enter a comment for the recipient (Optional).

When adding documents to the package, add the read-only files to the package if they were created. This will ensure that other ProjectWise users will not change the state or contents of the documents at any time prior to issuing the package.

4. On the **Documents** tab,
 - a. Select **Add**
 - b. Browse to locate documents
 - c. Select the **Read-Only** files to add to the package
 - d. Click **Open**
5. On the **Scheduling** tab,
 - a. **(OPTIONAL) Select an Issue Date** – Date you want the package issued to the recipient
 1. Set reminder date to be reminded to issue the package.
 - b. **Select an Acknowledge Due Date** – Date you want the package acknowledged by recipient
 1. Set reminder date to notify recipient to acknowledge package.
 - c. **Select a Response Due Date** – Date you want to receive response from recipient
 1. Set reminder date to be reminded to issue package.
6. 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** in the dropdown menu next to **Issue** to 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 to **Confirm** your transmittal.