

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

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

External Participants – Receive Responses

1. When receiving responses for a transmittal, you will be notified via Microsoft Outlook.

Hello Glenn Williams,

All responses have been received from all recipients for the transmittal package portal test, 654321-TR-0000003.

To view the transmittal response status, click the link below or paste it into your browser's address bar:

[portal test](#)

Transmittal details

Project: Testing (projectWise Deliverables Mngt)

Subject: portal test

Purpose: For Review

Content: 1

Acknowledge by: 4/1/2016 11:44 AM Coordinated Universal Time

Respond by: 4/13/2016 11:44 AM Coordinated Universal Time

Issued by: Glenn Williams, glennlaurawilliams@gmail.com



This is an automatically generated email notification sent via ProjectWise Deliverables Management service.

Do not reply to this email. Instead you can [tell us what you think about ProjectWise Deliverables Management](#)

2. To open the package from the email notification, click the link in the email.

Hello Glenn Williams,

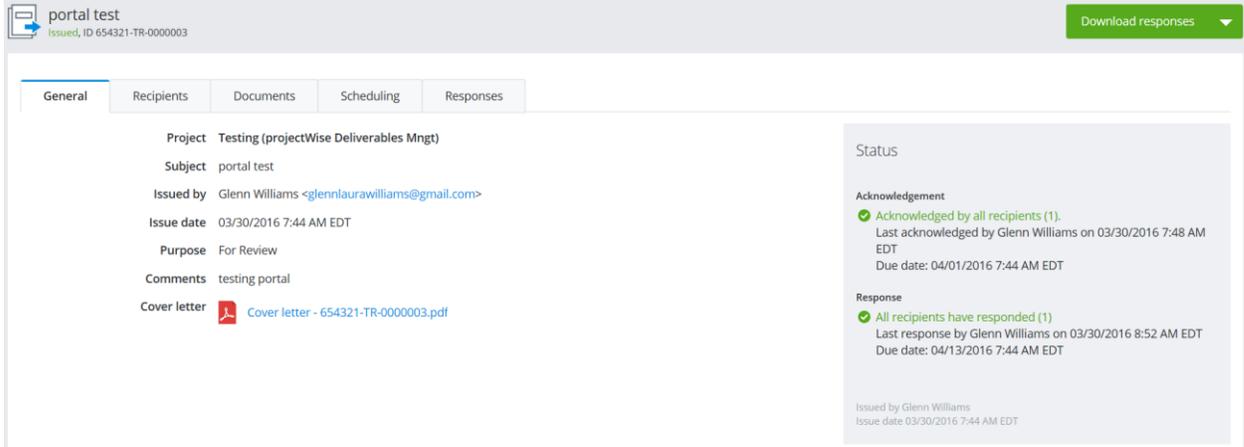
All responses have been received from all recipients for the transmittal package portal test, 654321-TR-0000003.

To view the transmittal response status, click the link below or paste it into your browser's address bar:

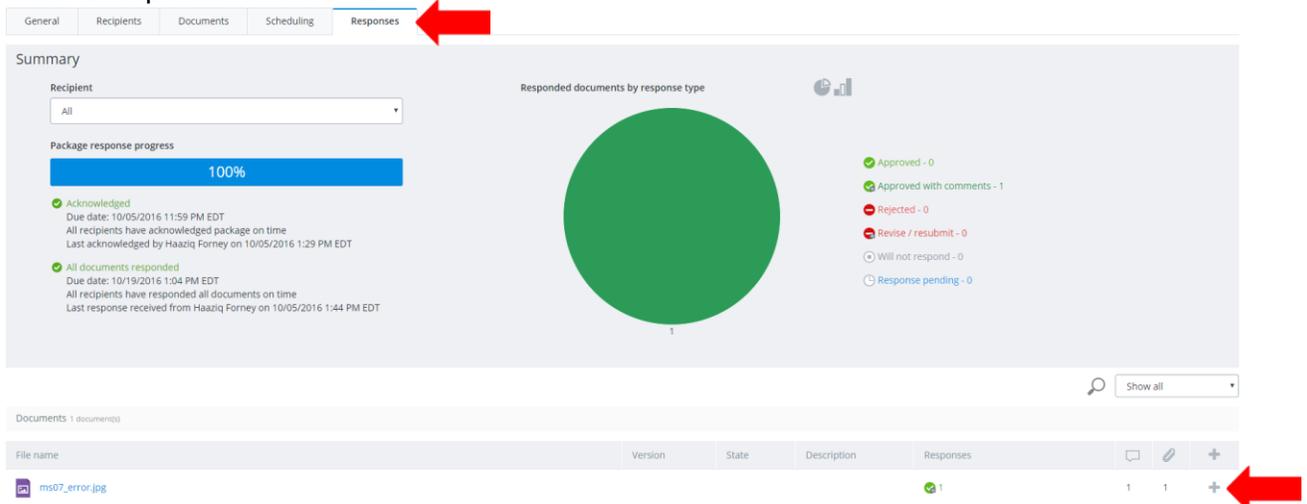
[portal test](#) 

3. When your browser opens, sign in with your Bentley account (if applicable).
 - a. Enter your **Email Address**.
 - b. Enter your **Password**.
 - a. Click **Sign In**.

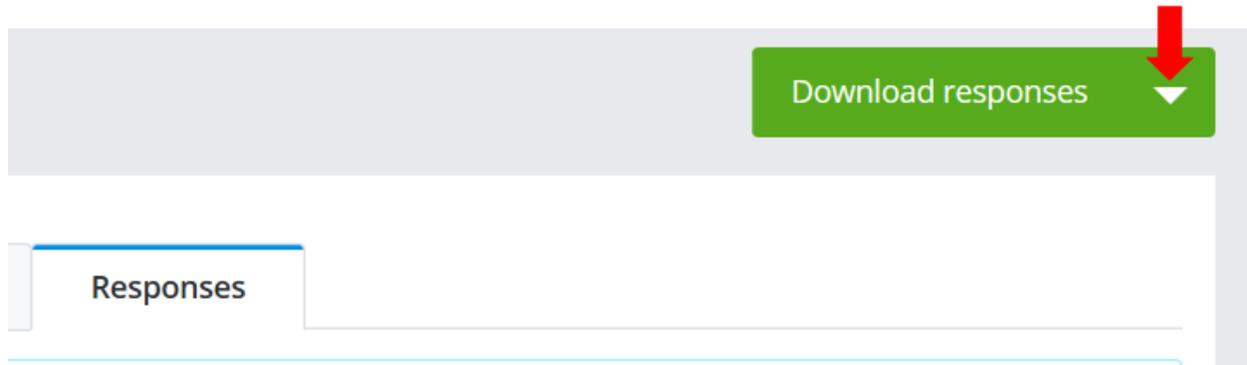
4. After successfully logging in, the ProjectWise Deliverables Management portal for the project will open.



5. Click on the Responses tab to see responses, then click plus sign (“+”) beside each file to see the response for that file.



6. Click the dropdown arrow next to the **Download Responses** button in the top right corner to download the desired responses/files to your PC/server.



- **Download Responses:** Downloads an Excel file (Responses.xlsx) containing the responses, as well as all attached mark-up file(s).
- **Download Content:** Downloads the attached mark-up file(s) and cover letter