Introduction

ProjectWise is a suite of applications bundled to provide a seamless work environment for a wide variety of projects. Different components of ProjectWise are used by multiple divisions within the Virginia Department of Transportation (VDOT). ProjectWise provides a Project Collaboration and Document Management tools for VDOT to maintain and archive project plans, CADD drawings, as well as final project documents. The ProjectWise Deliverables Management (PWDM) component is used to receive transmittals, request for information (RFI), and general correspondence communications through the Bentley CONNECT Web Portal. Together, these applications allow a single source of collaboration to share, track, and archive project information.

The purpose of this guide is to provide a brief general walk-through of the ProjectWise Deliverables Management platform for Localities working with the Virginia Department of Transportation.

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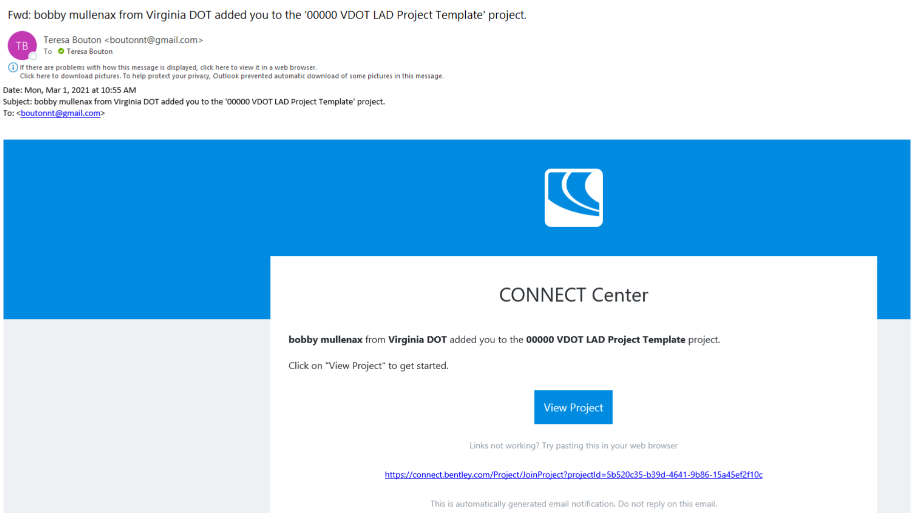
ProjectWise Portal

ProjectWise Deliverables Management (PWDM) is the primary method of submitting and receiving submittals for Virginia Department of Transportation - Locally Administered Projects (LAP). The ProjectWise Deliverables Management rules engine uses a Distribution Matrix, which should closely resemble a project's communication matrix. This allows the system to automate sending specific transmittal types to the appropriate, predefined users or groups. Purposes, distribution rules, and categories are customizable and a project coordinator (or an authorized team member) must request administrators to make modifications.

Once you have been added to a ProjectWise Project you will receive a system generated email that will guide you how to access the Project. See example email below. You will click the View Project button to be taken directly to the Project in the portal

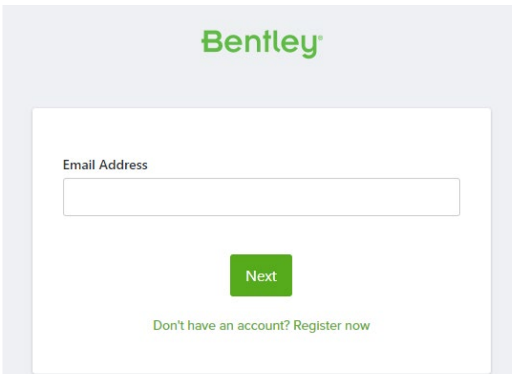


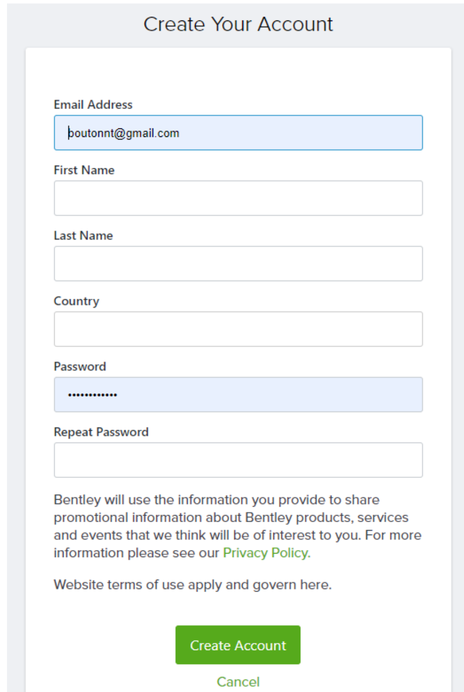
Accessing the ProjectWise Portal

Prior to accessing the ProjectWise Portal, it is necessary to ensure that the user has a Bentley IMS account. Please see the *Initial Portal Login* appendix below and return here if needed.

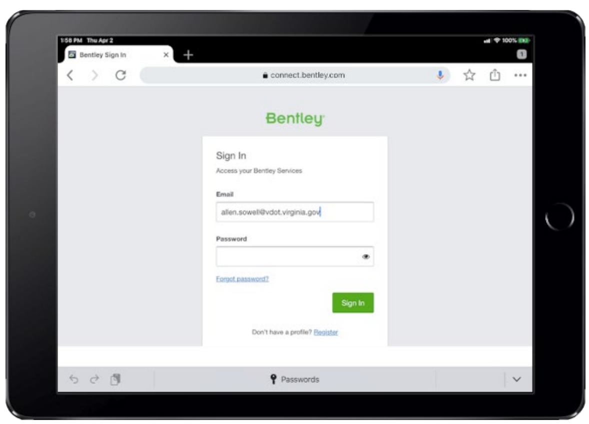
Creating an IMS account:

1. Creating a Bentley account is a one-time setup that can then be used to access both the Bentley CONNECT Center and Bentley Communities. To begin, launch Chrome browser and go to https://connect.bentley.com and select "Don't have an account? Register now" "Create your account" dialog box will launch. Fill in your information and select "Create Account" You will be guided through the rest of the process via emails to the address listed



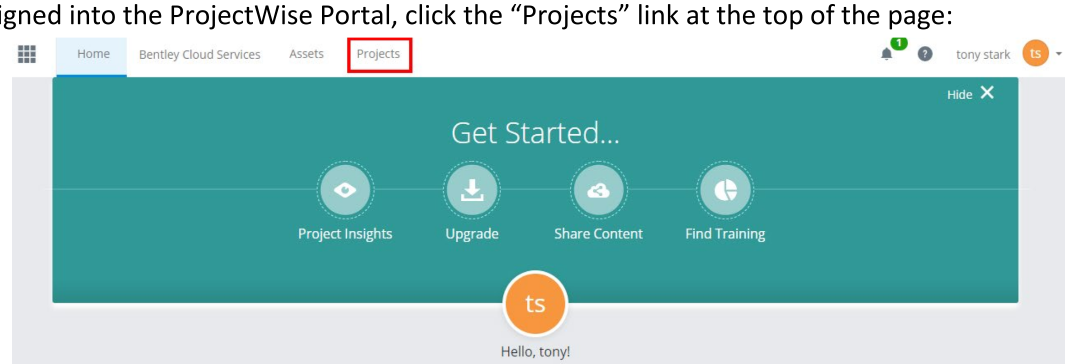


1. The ProjectWise Portal application may be used on either a Windows or Macintosh computer or mobile devices. Localities should log into *https://connect.bentley.com* using their full company email address:

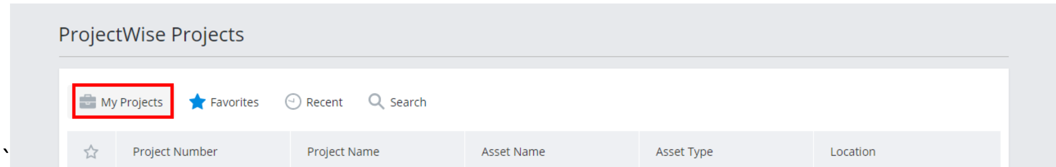


Note: It is recommended to use the Google Chrome browser to access the ProjectWise Portal on either Windows computers or mobile devices.

2. Once signed into the ProjectWise Portal, click the "Projects" link at the top of the page:



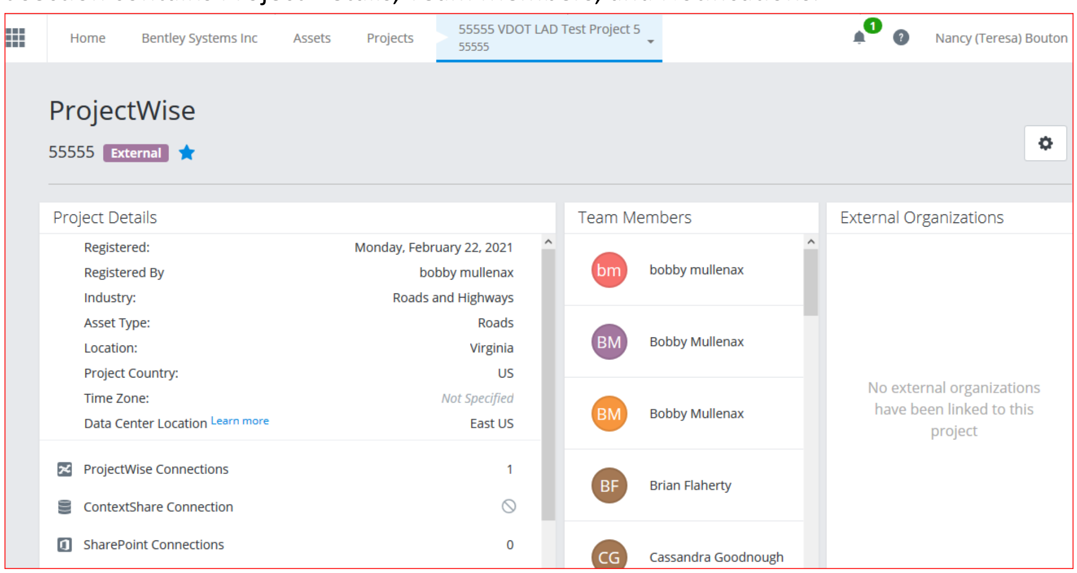
3. Click on the "My Projects" link to view all user-assigned projects:



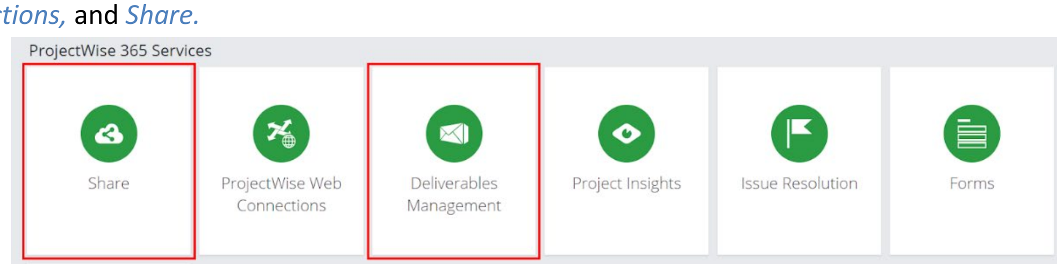
4. Select the star icon to the left of any projects you would like to make a favorite. Starred projects will now display on the “Favorites” tab.

5. Click the “Project Number” (or “Project Name”) of the project you would like to view:

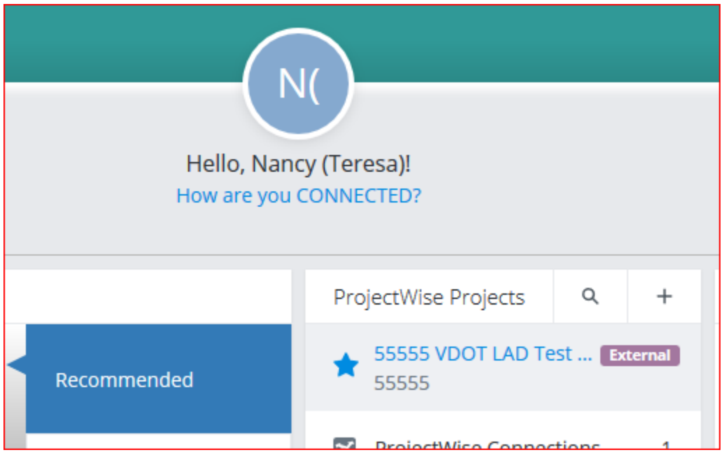
6. The project portal page will appear.
7. The first section contains Project Details, Team Members, and Notifications.



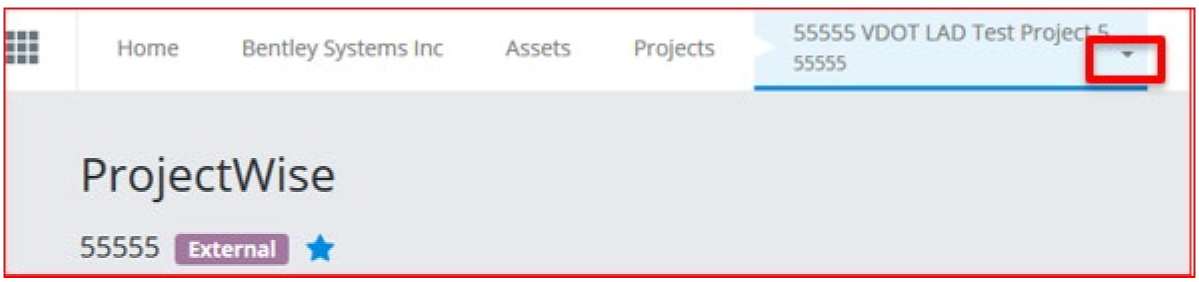
8. Beneath the Project Information section is the ProjectWise 365 Services panel. This area will vary in content, based on a user’s role and assigned permissions within the ProjectWise Portal environment. Currently, primary areas of focus for VDOT Local Administered Projects are, in order of priority: *Deliverables Management, Web Connections,* and *Share.*



9. Upon the next login, the most recently opened project will be displayed in the "ProjectWise Projects" section of the Bentley CONNECT landing page, allowing quick and easy access:



Note: If the user is assigned to multiple projects, they may be navigated to from the breadcrumb menu by clicking the triangle next to the project name:



ProjectWise Deliverables Management (PWDM)

ProjectWise Deliverables Management is the primary method of submitting and receiving submittals for VDOT LAP projects. The PWDM rules engine uses a Distribution Matrix, which should closely resemble a project's communication matrix. This allows the system to automate sending specific transmittal types to the appropriate, predefined users or groups. Purposes, distribution rules, and categories are customizable and a project coordinator (or an authorized team member) must request an administrator to make modifications.

Transmittal/Submittals Packages – These packages are used for review/approval**.**

When you need to review multiple documents and send separate response for each

Each document can be responded by multiple reviewers from different organizations

Ability to review and markup PDF via web browser, all parallel PDF reviewers from same organization can see each other comments/issues

Helps resend new document versions with fixes

Transmittals

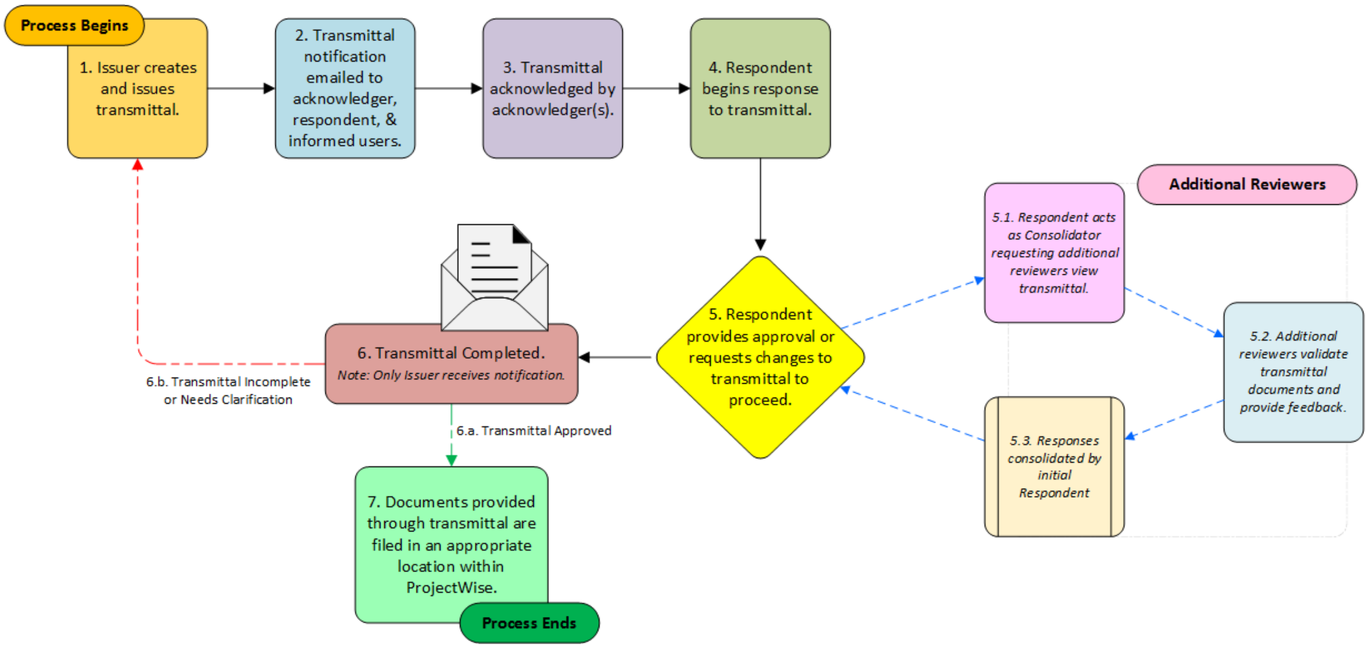
PWDM Transmittal Purposes

Within ProjectWise Deliverables Management, a transmittal may be issued for many purposes, including the following:

For Approval	Approved; Rejected; Will not respond
For Review	Approved; Approved with comments; Rejected; Revise / Resubmit; Will not Respond
For Information	N/A (Response not expected)
Classifications	Classification will be utilized to define the type of submittal from the Locality to VDOT. Classification will signify which workflow diagram is to be used. PS & E Scoping C-25 Source of Materials Change Order CN Invoice and Reimbursement Construction Federal Authorization Design Waiver-Exception Start C-5 Ending LAP C-5 PE, RW, CN Reimbursement Request PE and RW Invoice and Reimbursement Plan Review Pre-Award Review Project Agreement PE Authorization Public Hearing and Willingness Approval

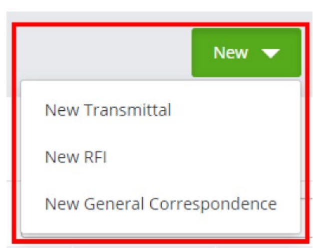
QAP
RW Authorization
Scope Change Validation

PWDM Transmittal Workflow Diagram

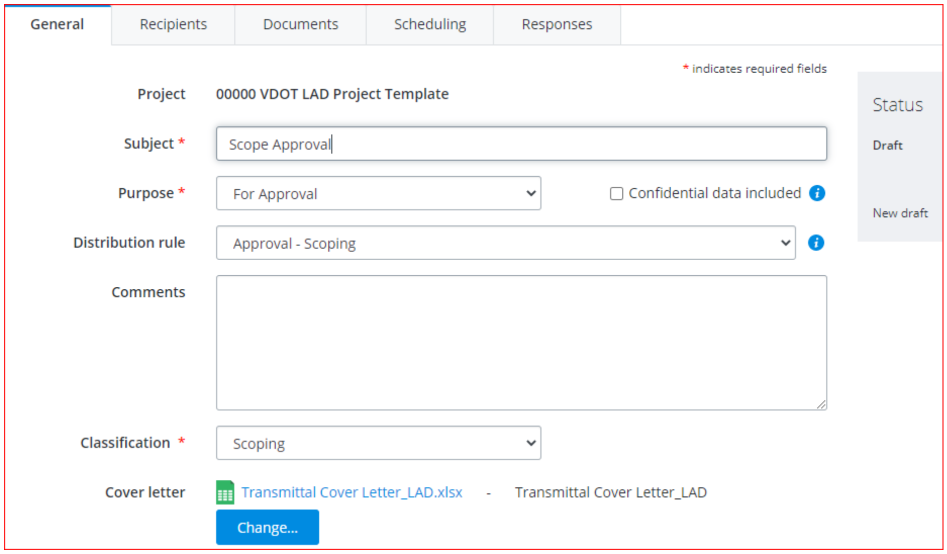


Issuing a Transmittal

2. Click the New dropdown menu and select “New transmittal”:



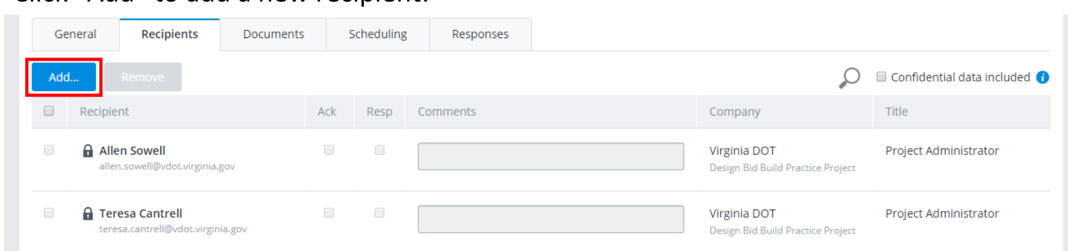
3. The Transmittal draft form will appear:



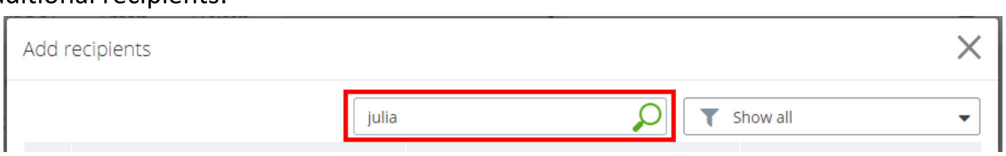
a. Enter a relevant subject for the transmittal, select the appropriate Purpose, Distribution rule and Classification, and enter any necessary comments.

Note: For more information on purposes, see the PWDM Transmittal Purposes section above.

4. Click on the “Recipients” tab to verify or add new recipients to the transmittal. **Localities should not need to add new recipients if the distribution rule is applied to the transmittal.**
   a. Click “Add” to add a new recipient:

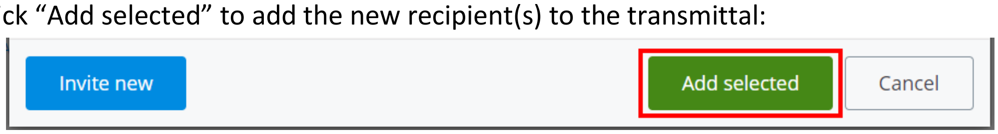


   b. Use the magnifying glass to search for a new user or scroll through the available user list to find additional recipients:

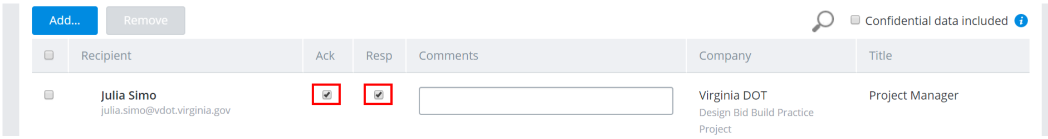


   c. Check the box to the left of the desired recipient’s name:

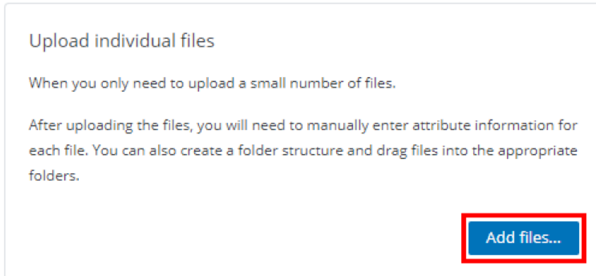
   d. Click “Add selected” to add the new recipient(s) to the transmittal:



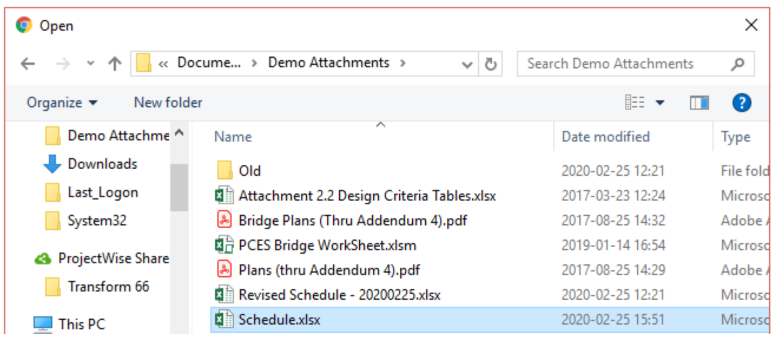
   e. If the recipient must acknowledge the transmittal, ensure there is a check in the “Ack” column. If the new recipient must respond, ensure that there is a check in both the “Ack” and the “Resp” columns. If neither is required, ensure that there is no check in either column:



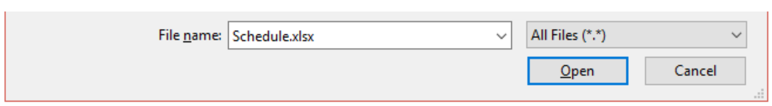
5. Navigate to the “Documents” tab and click “Add files…” to add documents to the transmittal:



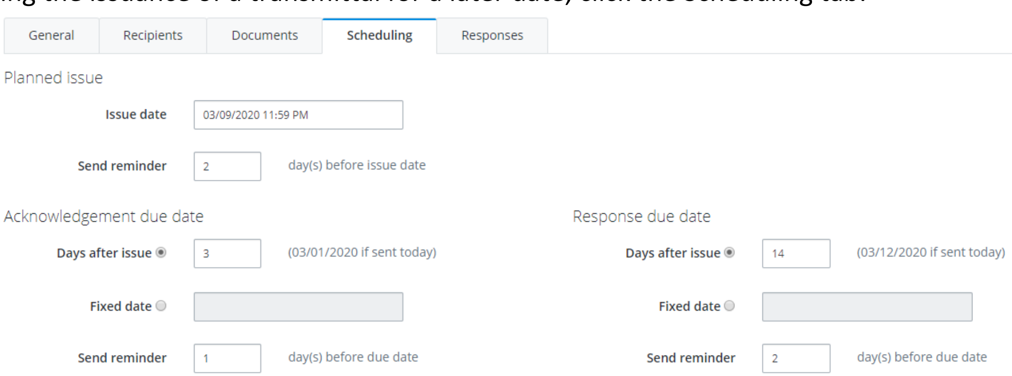
   a. Browse to the file(s) desired to be attached using the file browser pop-up window and select one or multiple files:



   b. When ready to attach, click “Open” at the bottom of the file browser window to upload the selected file(s):

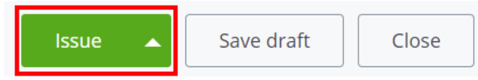


6. If scheduling the issuance of a transmittal for a later date, click the Scheduling tab:

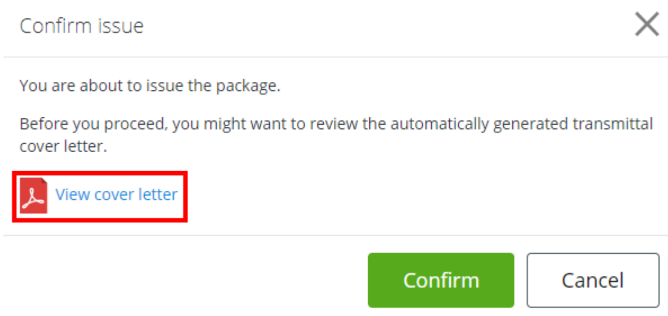


Note: This feature should be used at the discretion of the project coordinator and may vary based on constraints specific to each project. It is recommended to only change the “Issue date” field to the appropriate date/time and not to adjust any other field in order to maintain the integrity of transmittals with the specific requirements of each project. VDOT staff and Localities are obligated to ensure that both acknowledgement and response due dates are adhered to and accurate within ProjectWise Deliverables Management. The distribution matrix will set the Response Date to 20 days

7. When the transmittal is ready for issuance, click the “Issue” button at the bottom of the page:



8. To verify recipients, comments, and documents included within the transmittal, click the “View cover letter” link on the “Confirm Issue” pop-over. Click the “Confirm” button to complete issuing the transmittal or “Cancel” to make additional changes:



PWDM Transmittal Response Types

Respondents typically have at least four (4) choices for responding to a transmittal:

1. Approved: The transmittal is approved with no recommendations/changes. (This transmittal is good to proceed.)
2. Approved with comments: The transmittal is approved but minor changes may need to be made. (This transmittal looks accurate but there may be caveats.)
3. Revise/Resubmit: The transmittal may need additional documents or may not have all data required for the respondent to make a decision. Additional documentation may be sent back by a respondent, which needs to be added to the transmittal. (Update the transmittal to proceed.)
4. Rejected: The transmittal cannot be approved. (Back to the drawing board.)

Note: Additional answer selections may be added at the request/approval of the project manager.

Requests for Information (RFI)

Requests for Information may be sent using the ProjectWise Deliverables Management application. The interface for doing this is very similar to a web-based email client. Issuing an RFI through the PWDM application should be done to solicit feedback as part of the project record and should not be used in lieu of a transmittal/submittal.

RFI Packages - Formal request for information

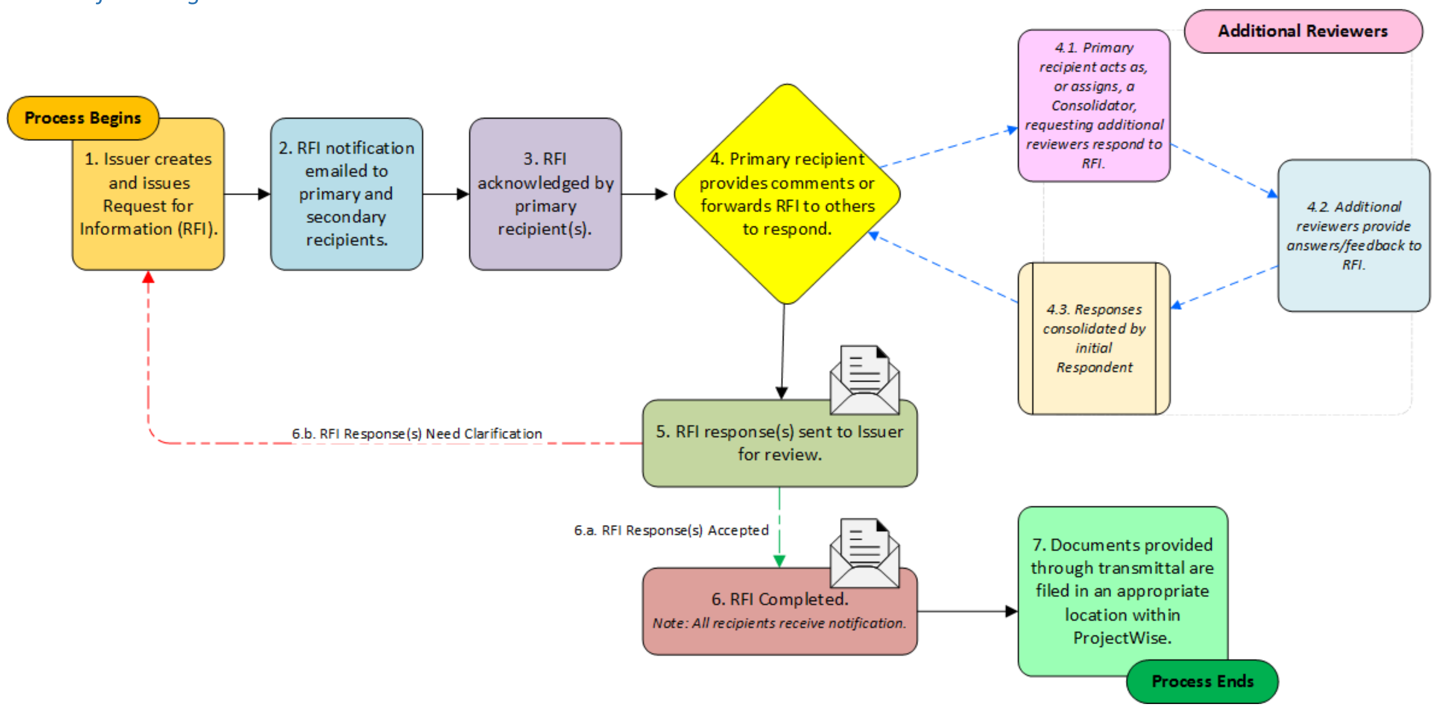
Single response per package from single RFI recipient (cc recipients are kept in the loop but can’t respond)

No ability to respond per each attached document

Multiple response cycles until response is accepted

Ability to suggest and finalize impact to help negotiate scope

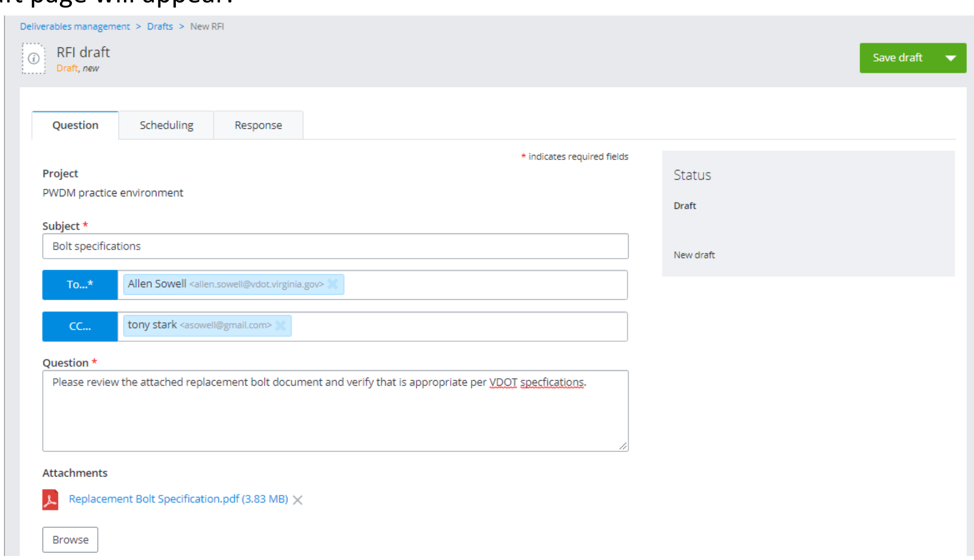
RFI Workflow Diagram



Issuing a Request for Information in the ProjectWise Portal

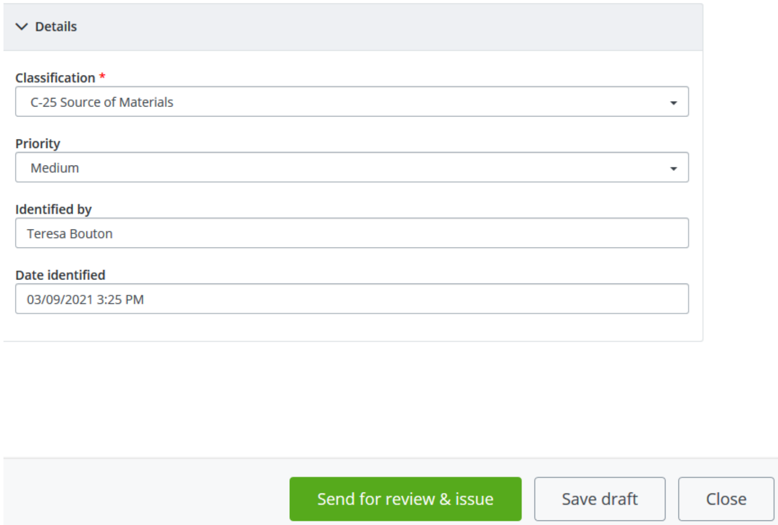
1. Navigate to ProjectWise Deliverables Management
2. Click the “New” button and select “New RFI”

3. The RFI draft page will appear:



4. Enter a descriptive Subject
5. Select the appropriate primary and secondary recipient(s) by clicking “To” and “CC”, respectively:
    a. Primary RFI recipients (in the To field) are required to acknowledge receipt of an RFI
    b. Secondary RFI recipients (in the CC field) are not required to acknowledge receipt of an RFI
6. Enter a request in the “Question” field

7. Add any necessary attachments by clicking "Browse" and locating the appropriate file(s) within the device's local storage
8. Expand the "Details" section of the RFI form and fill out the "Classification" and any other relevant field(s):



9. When the Request for Information form is completed, click the "Send for Review & Issue" button at the bottom of the page
10. Finally, click "Confirm" at the bottom of the page to send the RFI to its designated recipients.

General Correspondence (GC)

General correspondence may also be sent using the ProjectWise Deliverables Management application. The interface for doing this is also very similar to a web-based email client. Issuing a General Correspondence through the PWDM application should only be done to facilitate communication as part of the project record and should not be in lieu of a transmittal/submittal.

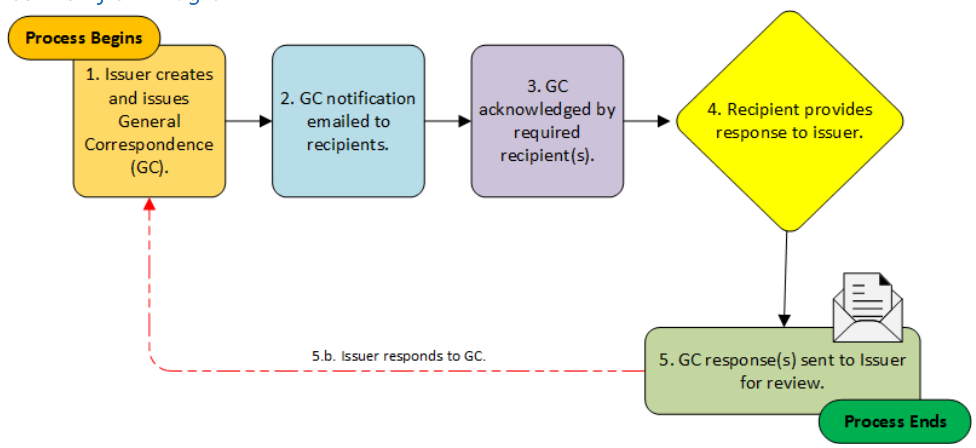
General Correspondence Package - Manage and track all contractual communication using single tool

Multiple responders supported per package. CC recipients may also respond

Threaded view to see multiple related packages and their responses in single page

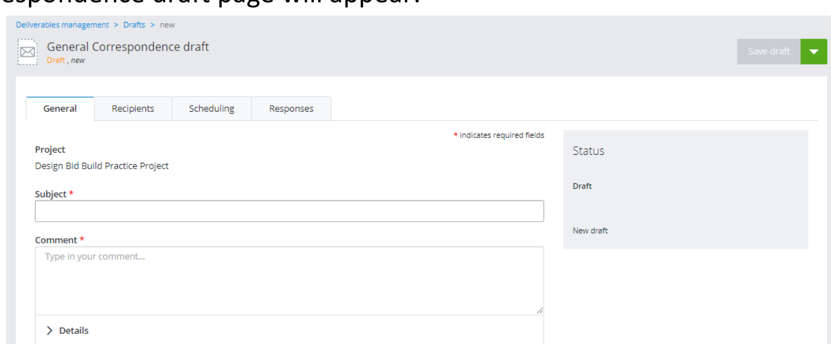
Better than email: Custom form with configurable attributes; Response due dates and reminders: Audit trail

General Correspondence Workflow Diagram

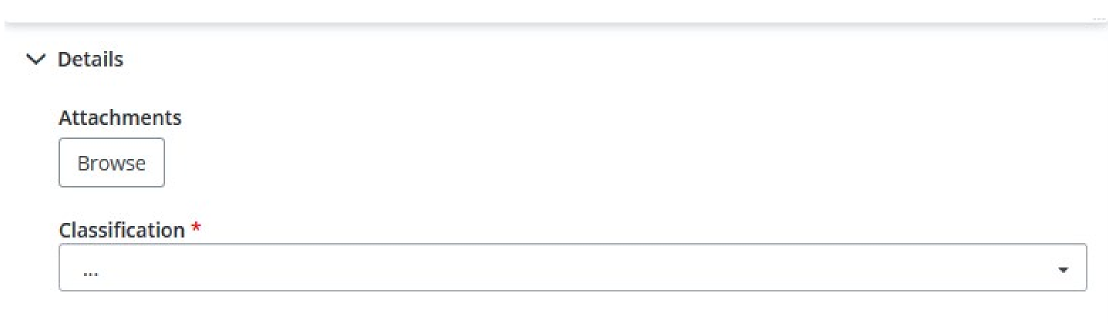


Issuing General Correspondence in the ProjectWise Portal

1. Navigate to ProjectWise Deliverables Management
2. Click the "New" button and select "New General Correspondence"
3. The General Correspondence draft page will appear:



4. Enter a subject and comments in the respective fields
5. Expand the "Details" section to add an attachment to the General Correspondence or add other relevant information:



6. Navigate to the Recipients tab
   a. Click the "Add recipients…" button
   b. The "Add recipients" pop-over will appear
   c. Find the desired recipients and click the checkbox next to the name of the desired user(s) to select

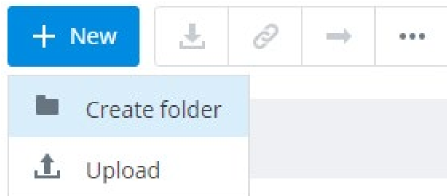
   d. Click “Add selected” at the bottom of the pop-over
   e. Similar to the *transmittal process*, users may be responsible to respond or acknowledge general correspondences within PWDM. Check the box in either the “Ack” or “Resp” columns next to each user in order to make acknowledgement or response mandatory for the desired user(s). If informational-only, these checkboxes may be left blank

7. When ready to send, click the “Issue” button at the bottom of the page
8. A confirmation pop-over will appear. Click “Confirm” to proceed with the issuance of the General Correspondence.

ProjectWise Share

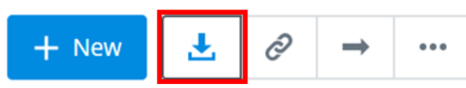
ProjectWise project portal provides the "Share" tool. This is a common file storage area for collaboration which is available on the web. Share is similar to a "Drop Box" and should only be used for non-sensitive data and documents. Share offers limited permission controls. As such, it is recommended that the use of Share be limited to file sharing and transfers prior to issuing a formal transmittal.

1. To upload a new file or create a folder, click the "+ New" button:



2. Clicking on the names of files or folders will open them. Microsoft Office (Word, Excel, etc.) files will open, by default, in Microsoft Office 365 web-mode. PDF files will open, by default, within the *PDF Markup Tool*.

3. To download one or multiple files to a PC or mobile computing device, place a check in the checkbox next to each of the desired files, then click the Download button:

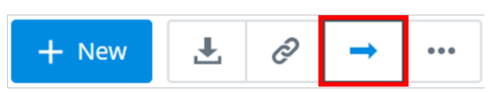


Note: Multiple file/folder selections will be zipped into a file named "ShareFiles.zip" which may be saved to a local drive.

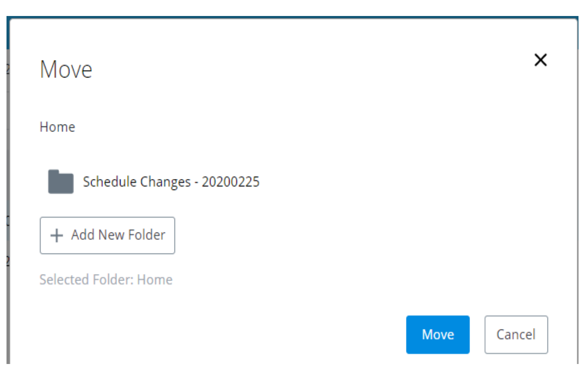
4. To share a link to a file with another project team member, place a check next in the checkbox next to it and select the link button:

Note: When clicked, the link to the file may be pasted into an email or document. Use [CTRL+V] or right-click the mouse and select "paste" on a Windows computer to use this feature.

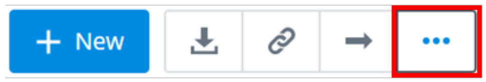
5. To move files, place a check in the checkbox next to each desired file (or folder) and click the arrow button to move it to another location:



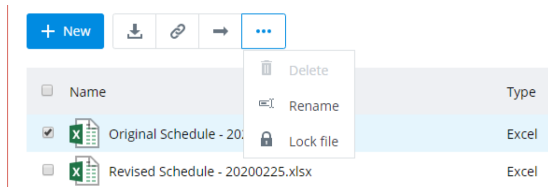
Note: Additional folders may also be created after clicking the Move button:



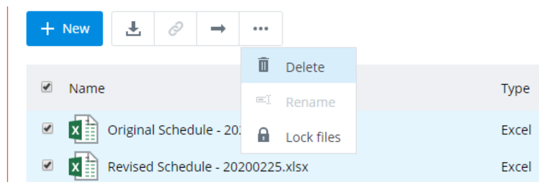
6. Additional options are available via the ellipsis menu:



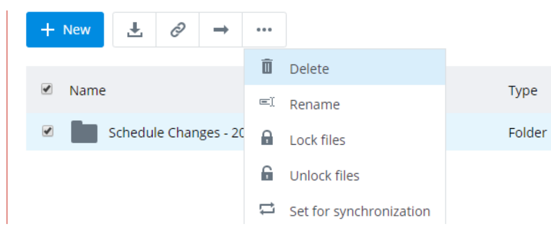
   a. Non-Admin users may not delete files, but they may rename or lock files, as needed:



   b. Users may delete, rename (individual files only), and lock files via the ellipsis menu:



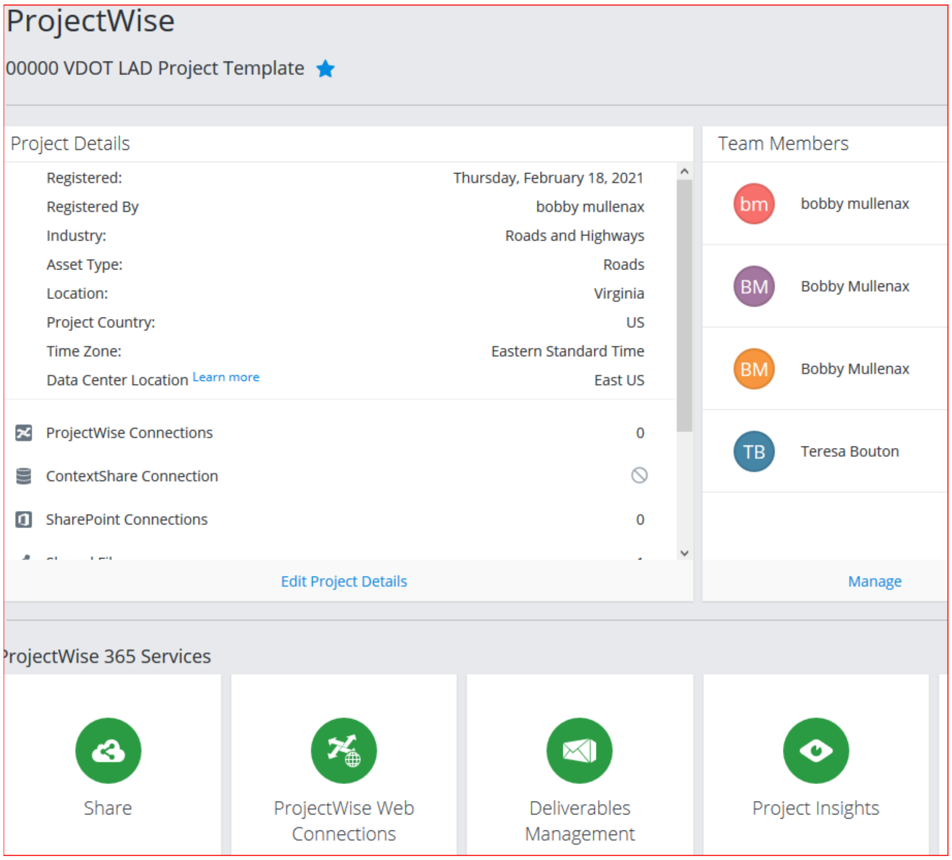
   c. Users may delete, lock, unlock, and set synchronization status on folders, via the ellipsis menu:



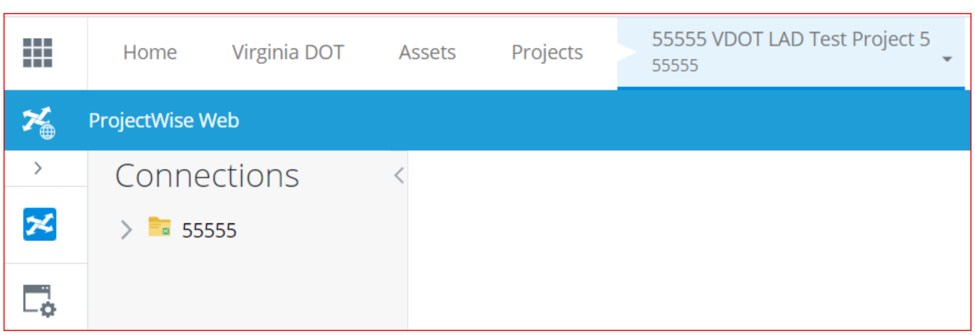
ProjectWise Web Connections

ProjectWise Web Connections provides web access to the VDOT ProjectWise file storage to any user with a valid ProjectWise-enabled network account. Using this service, a user may access files located on physical VDOT ProjectWise servers

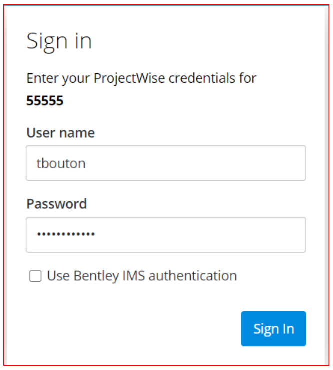
1. Log onto Bentley Connect (*https://connect.bentley.com*)
2. Navigate to the appropriate project, then to "ProjectWise Web Connections" located in the ProjectWise 365 Services section of the project portal page and select your Project:



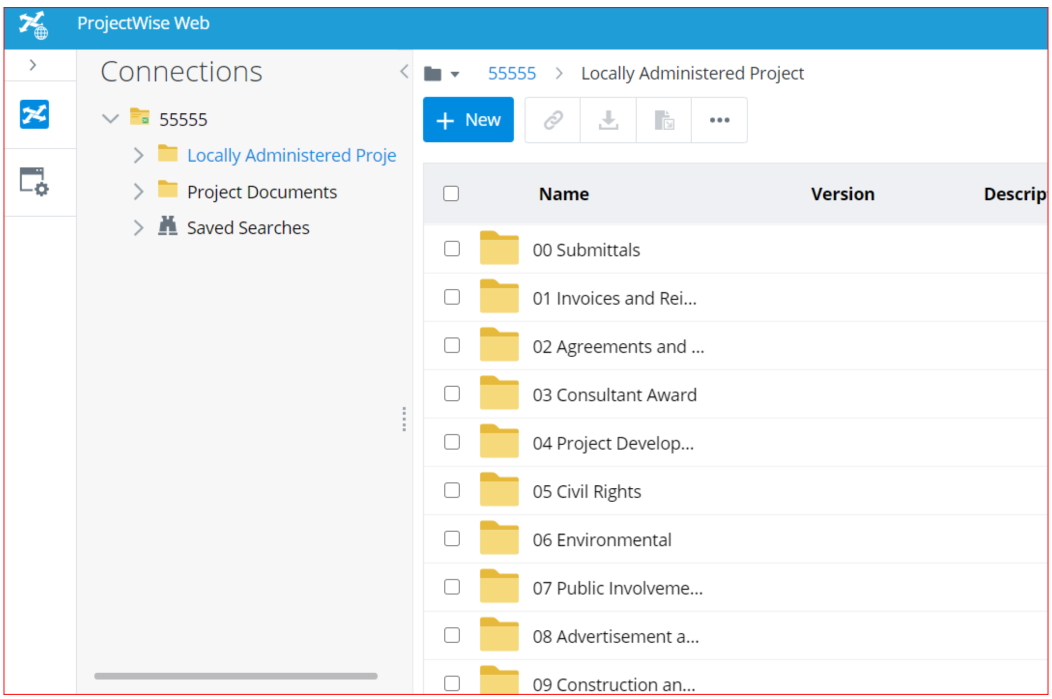
3. Select the ProjectWise Web Connections and in the following screen, elect the Project number to expand



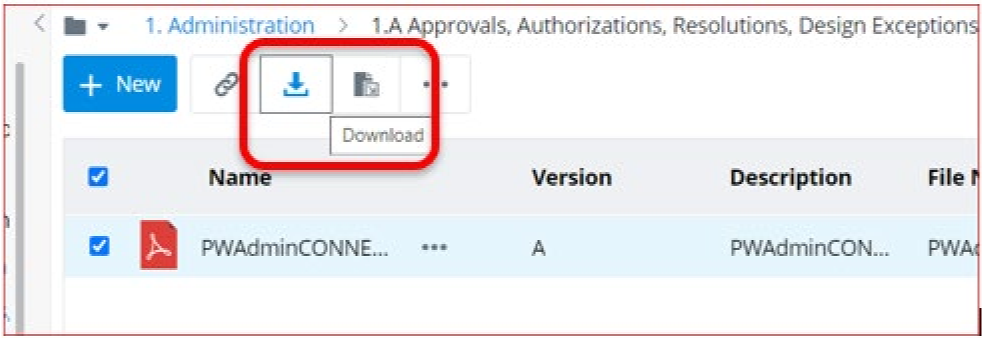
1. You will be required to enter your username and password



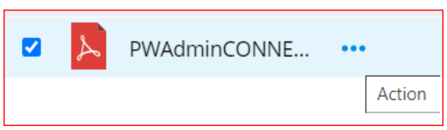
5 You will now see your ProjectWise folder structure displays just like the ProjectWise Explorer. Your permissions are the same as they are in ProjectWise Explorer.

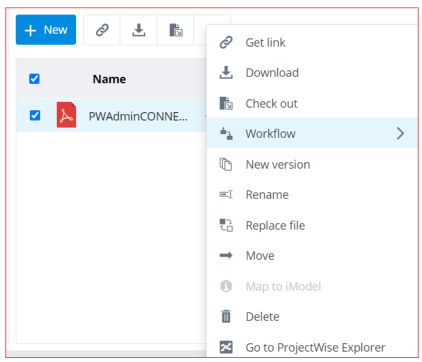


6 Keep expanding the folder structure and navigate to the intended folder and select the document, now choose download tool to copy to your computer to open



7. Select the … next to the file to display the entire list of Actions available for the document

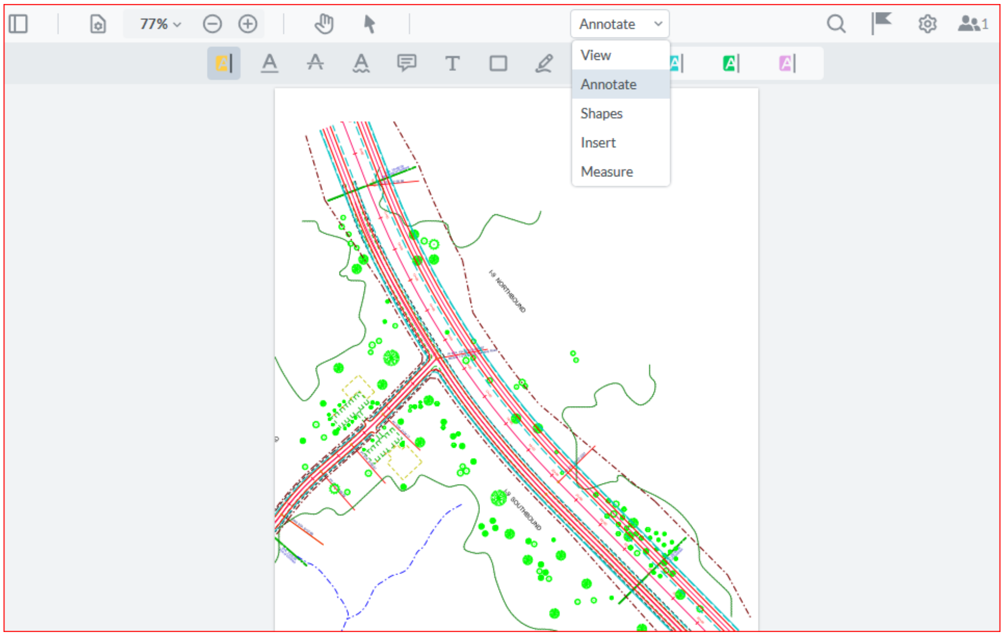




PDF Markup Tool

Within the Bentley ProjectWise project portal is an embedded PDF markup tool. The PDF Markup tool is accessible in "Share", "PWDM", and "ProjectWise Web Connections" with read-write capabilities, where possible. From within either application, click the filename of a PDF document to access the PDF Markup tool.

- When the user has modify/write permissions, the PDF markup tool will appear as follows:

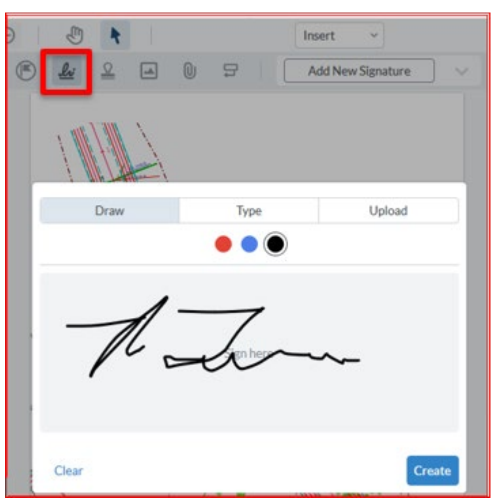


Note: In ProjectWise Web Connections, the PDF markup tool will require a user to log in using his/her COV account credentials.

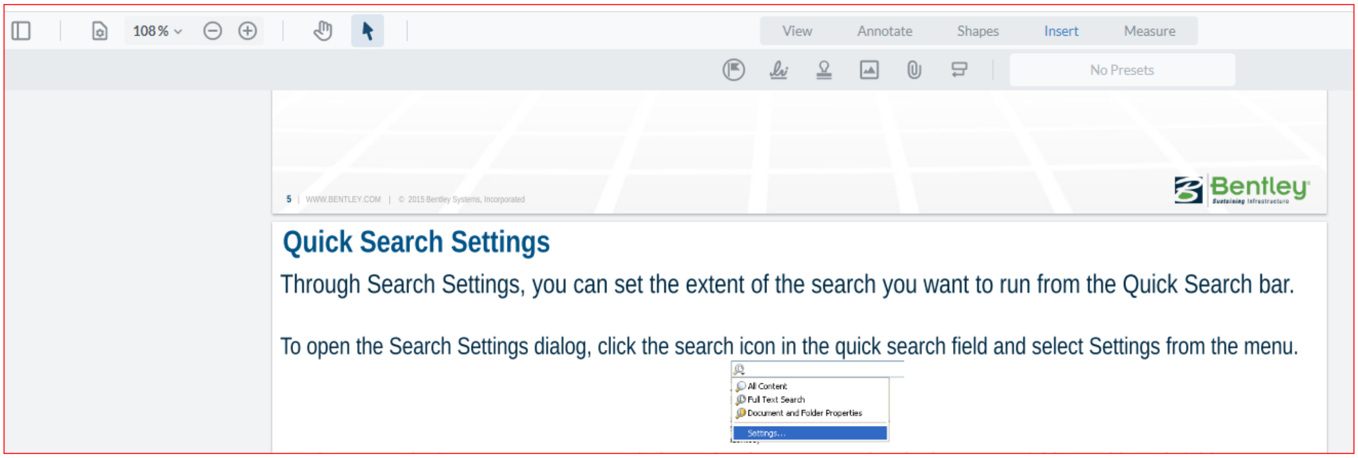
- When the user has read-only access to a file, the PDF markup tool will display a red padlock signifying that the document is read-only in lieu of providing markup utilities, etc.:

- The signature button from the markup tool section allows a user to, using a mouse, sign his/her name in a box which may be rendered onto a PDF by dragging and dropping:

hich may be rendered onto a PDF by dragging



- From the ProjectWise Deliverables Management application's Documents tab, the PDF markup tool will appear as follows:



  - Click the back button to return or the pop-out button to open the file in a new browser tab: 

Note: The PDF markup tool does not modify original documents, but adds a transparent overlay, which contains and allows the display of user markup data.

Frequently Asked Questions

Q: What is the purpose and business need for Implementing ProjectWise?
A: The purpose of the ProjectWise Document Management System (DMS) pilot is to streamline the way construction-related documentation is stored regardless of the project or project type, throughout the Virginia Department of Transportation. This brings a unified approach, alleviating the need for project team members to search for files in several different places such as SharePoint, network shares, email, and cloud services. ProjectWise as a DMS solves this problem through allowing project team members to utilize a proverbial one-stop shop.

- **Locality users need to see pertinent data for all of the projects they administer.**
  - Need to establish a File Management System and improve the workflow and efficiency of Locality Administered Projects.
  - Localities don't have full access to our project documentation.
  - Need one place to store all project correspondence.
  - Reduce cost of an in-house developed solution by using a COTS package.

Q: What is the purpose and business need for Implementing ProjectWise Deliverables Management (PWDM)?
A: Very similar to the purpose of the ProjectWise DMS pilot, the ProjectWise Deliverables Management pilot aims to eliminate the need for transmittals to be sent, received, approved, etc., via email. Instead, the PWDM pilot is an attempt to consolidate user interactions within a single application, simplifying and unifying communication.

- **VDOT and localities need a more effective means of submitting, reviewing, and updating the materials pertaining to these projects.**
  - Need consistent and automated document submittal process for our local governments
  - Localities cannot efficiently track submittals through the review and approval process.
  - Everyone in the review/approval process should have tracking capabilities to quickly resolve issues and keep projects on schedule.
  - Need automated notification of submittals

Q: What is the address for the Bentley ProjectWise portal web page?
A: Navigate to *https://connect.bentley.com* and login using your company email address.
(**first.last@vdot.virginia.gov, *firstlast@company.com***)

Q: What email address will be notifying me of new transmittals, requests for information, or general correspondence?

A: Emails from ProjectWise Deliverables Management (PWDM) will be sent by projects' outbound email addresses in the following format: **VDOT.ProjectWise@VDOT.Virginia.gov**

Note: project email addresses aren't capable of receiving email responses or replies.

Appendix A: Additional Resources

If you need further assistance contact VDOT Cadd Support

External - *https://www.virginiadot.org/business/locdes/cadd_support.asp*

Internal - *https://insidevdot.cov.virginia.gov/div/ld/CADD/SitePages/Home.aspx*

Email - *caddsupport@vdot.virginia.gov*

Phone - 804-786-1280

YouTube Links

What is ProjectWise Deliverables Management? *https://youtu.be/71LcEfr22xs*

How Do I Get Started with ProjectWise Deliverables Management? *https://youtu.be/O_BdA5DU47k*

Creating and Sending a Transmittal *https://youtu.be/xncDxmTwE6A*

Receiving and Responding to a Submittal *https://youtu.be/5BYEaM3OPqw*

Working with RFI's *https://youtu.be/_siMi7v-ofM*

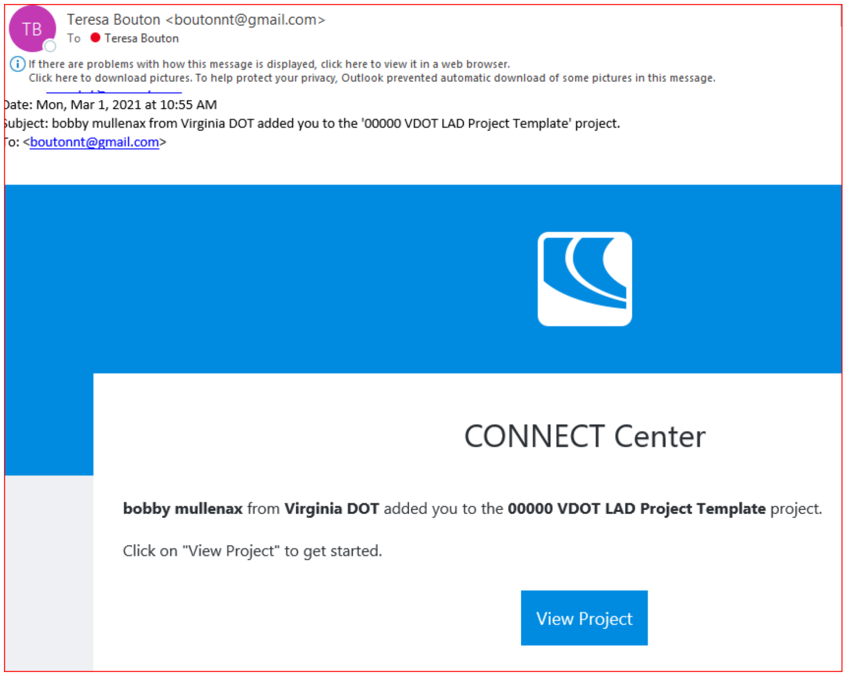
Viewing Package Responses *https://youtu.be/WkxeQcYhnHw*

Working Through the Cloud *https://youtu.be/8JCYiNN*-piY

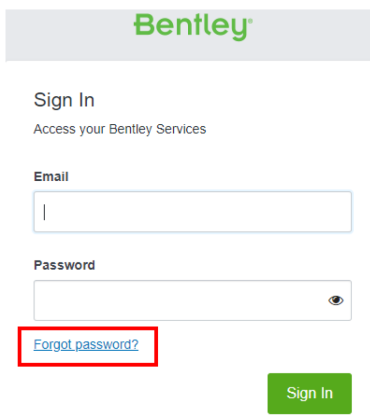
Appendix B: Initial Portal Login

Note: It is preferable to use the Google Chrome internet browser for Bentley ProjectWise web applications.

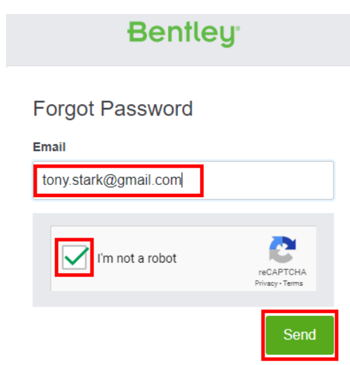
1. Initial Logon
    a. When assigned to a project, the Bentley system will send an email to the email address registered.
    b. When this email is received, click the "View Project" button:



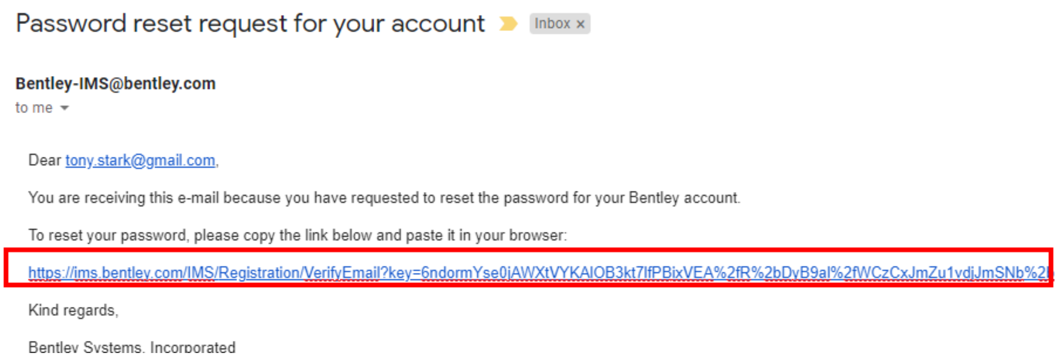
2. This will direct you to the Bentley Connect sign-on page. To set a new password, click the “Forgot password” link on the page:



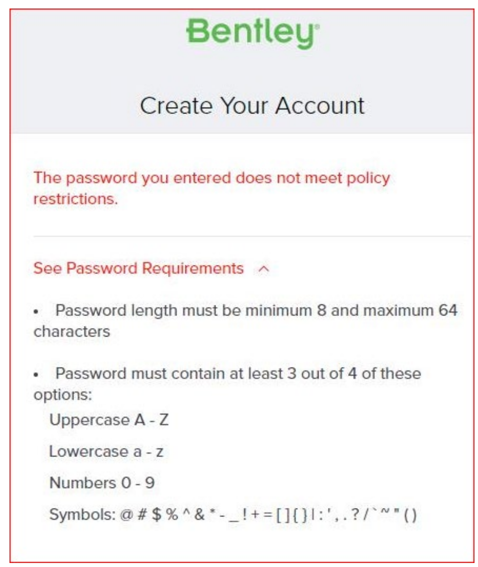
3. Enter your email address and check the reCAPTCHA “I’m not a robot” box. When complete, click “Send”:

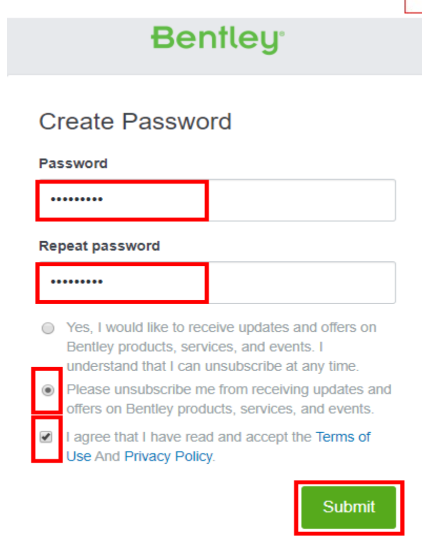


4. A password reset email will be sent to this account. Upon receipt, open the email and click the Bentley password reset link (or copy and paste the link into the address bar of your preferred ProjectWise-compatible web browser):

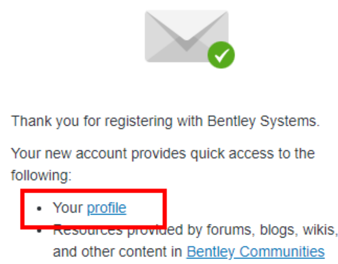


5. Complete the password reset process:
   a. Ensure the new password is strong (Uppercase, lowercase, numbers, and symbols)
   b. Select the desired email subscription options
   c. Finally, check the box in agreement with the Bentley terms of use and privacy policy and click the “Submit” button at the bottom of the form:

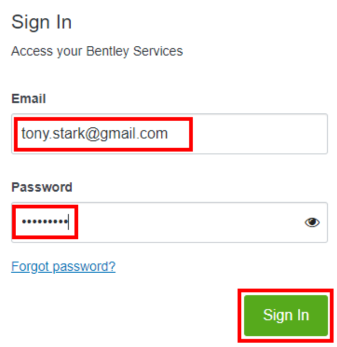




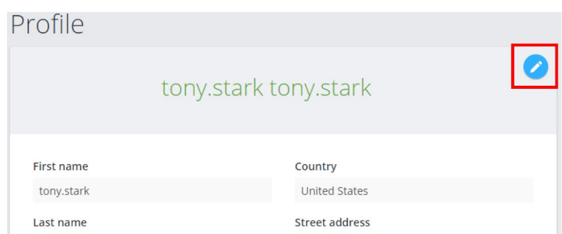
6. When submitted, a link will be provided to initially setup your account information. Click the "Your profile" link to proceed:



7. Log in using your business email address and newly created Bentley Connect password:



8. Click the pencil icon at the upper right of the profile page to edit your Bentley Connect profile:



9. Fill out the user profile page with current, valid information. When complete, click "Save" at the bottom-right: