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.

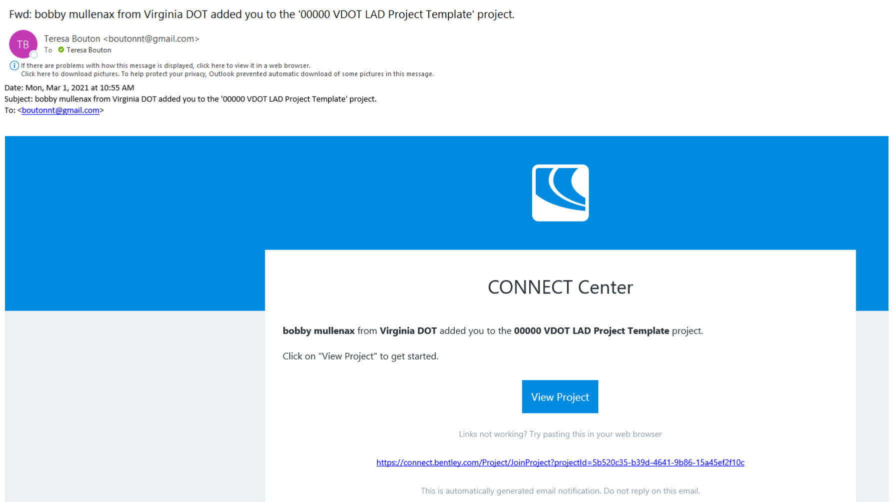
The purpose of this guide is to provide a brief general walk-through of the ProjectWise Deliverables Management platform and ProjectWise Explorer for Project Coordinators working on Locally Administered Projects for the Virginia Department of Transportation.

Contents

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


Fwd: bobby mullenax from Virginia DOT added you to the '00000 VDOT LAD Project Template' project.

Teresa Bouton <boutonnt@gmail.com>
To Teresa Bouton
If there are problems with how this message is displayed, click here to view it in a web browser.
Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

Date: Mon, Mar 1, 2021 at 10:55 AM
Subject: bobby mullenax from Virginia DOT added you to the '00000 VDOT LAD Project Template' project.
To: <boutonnt@gmail.com>

CONNECT Center

bobby mullenax from **Virginia DOT** added you to the **00000 VDOT LAD Project Template** project.

Click on "View Project" to get started.

View Project

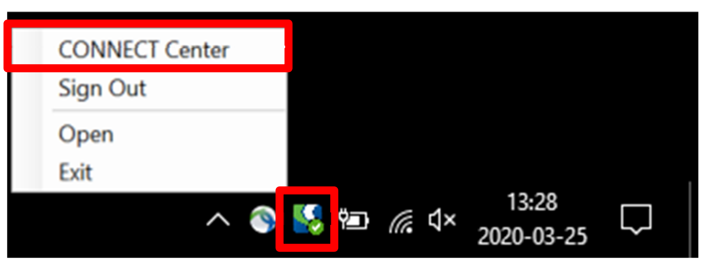
Links not working? Try pasting this in your web browser

https://connect.bentley.com/Project/JoinProject?projectId=5b520c35-b39d-4641-9b86-15a45ef2f10c

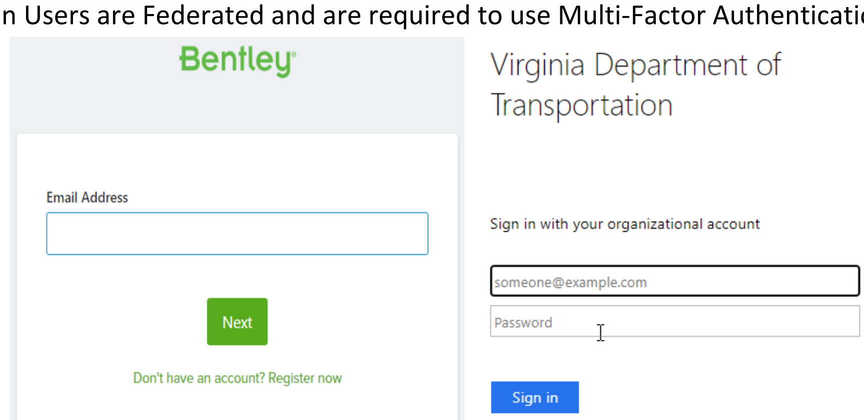
This is automatically generated email notification. Do not reply on this email.

Accessing the ProjectWise Portal

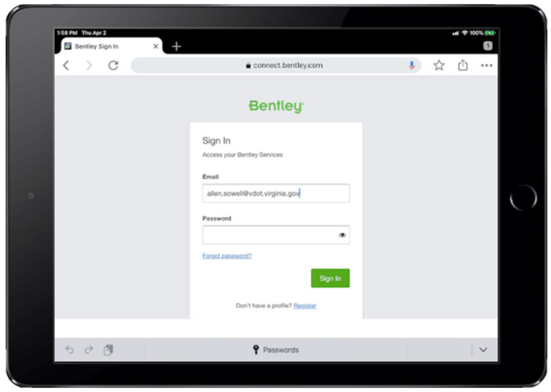
1. Log into Bentley Connect. There are multiple ways in which to log into the Bentley ProjectWise Portal.
   a. Click the Bentley Connection client icon in the system tray (bottom-right, near the clock). Then click "CONNECT Center". This will open the default web browser and sign the current user in automatically:



   b. COV Domain Users are Federated and are required to use Multi-Factor Authentication.

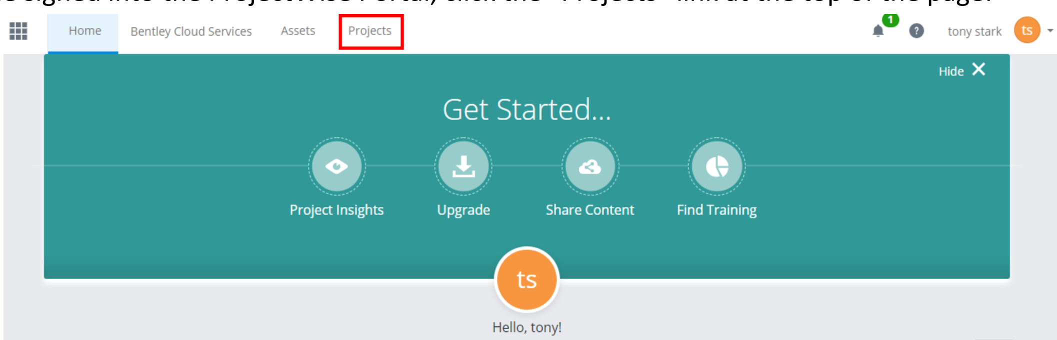


c. To use the ProjectWise web application on a mobile device (iPad, iPhone, or Android), VDOT staff members should log into *https://connect.bentley.com* using their full VDOT email address:

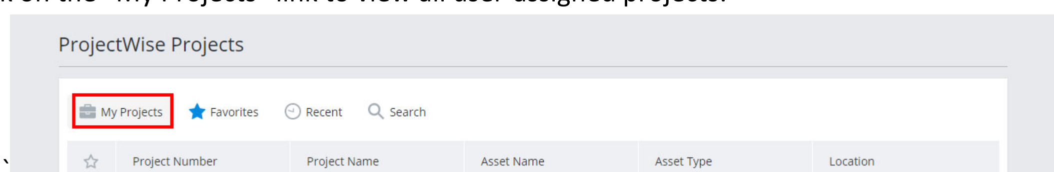


Note: It is recommended to use the Google Chrome browser to access the ProjectWise Portal on either Windows computers or mobile devices.

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



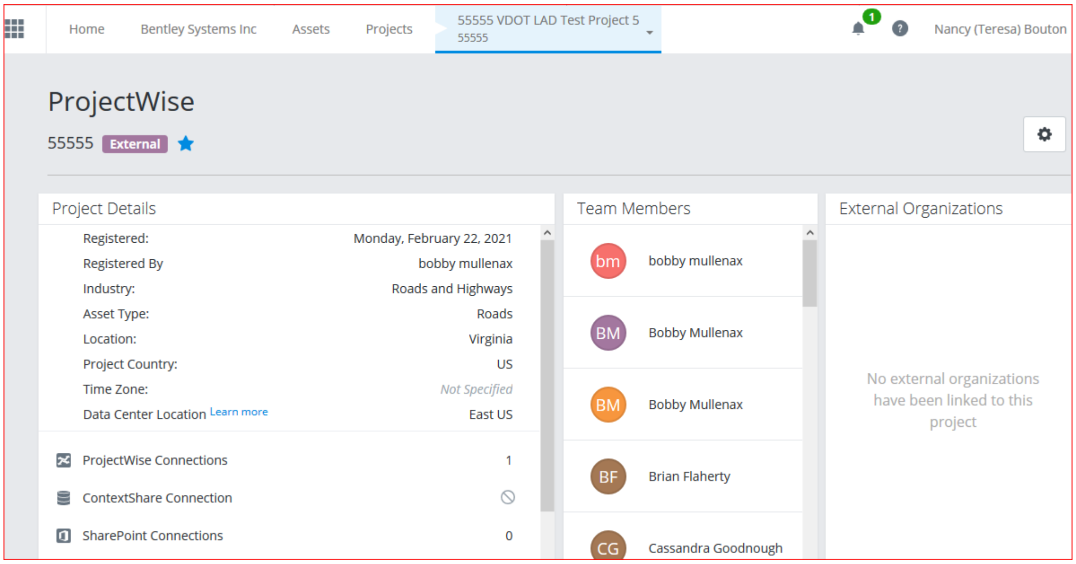
2. Click on the "My Projects" link to view all user-assigned projects:



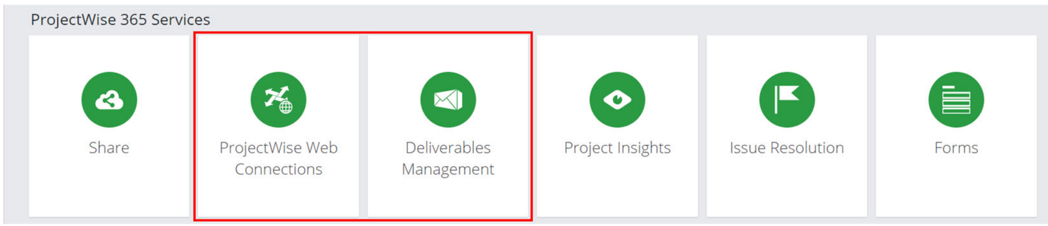
3. Select the star icon to the left of any projects you would like to make a favorite. Starred projects will now display on the "Favorites" tab.
4. Click the "Project Number" (or "Project Name") of the project you would like to view:

☆	Project Number	Project Name	Asset Name	Asset Type	Location
★	55555 VDOT LAD Test Project 5	55555		Roads	Virginia

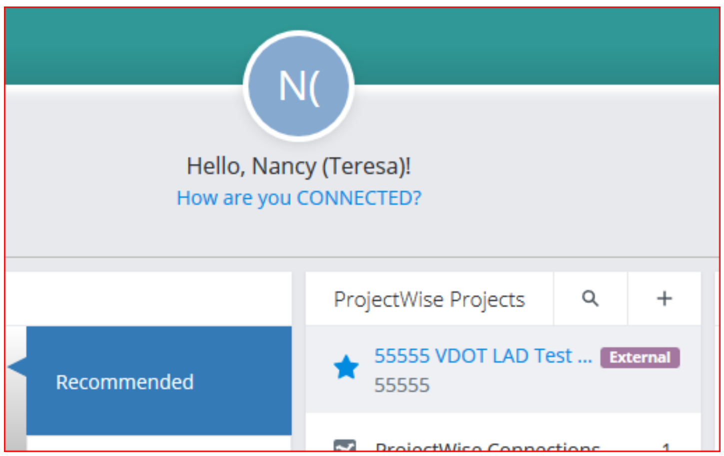
5. The project portal page will appear.
6. The first section contains Project Details, Team Members, and Notifications.


Home
Bentley Systems Inc
Assets
Projects
55555 VDOT LAD Test Project 5
55555
Nancy (Teresa) Bouton
ProjectWise
55555 External
Project Details
Registered: Monday, February 22, 2021
Registered By bobby mullenax
Industry: Roads and Highways
Asset Type: Roads
Location: Virginia
Project Country: US
Time Zone: Not Specified
Data Center Location Learn more East US
ProjectWise Connections 1
ContextShare Connection
SharePoint Connections 0
Team Members
bobby mullenax
Bobby Mullenax
Bobby Mullenax
Brian Flaherty
Cassandra Goodnough
External Organizations
No external organizations have been linked to this project

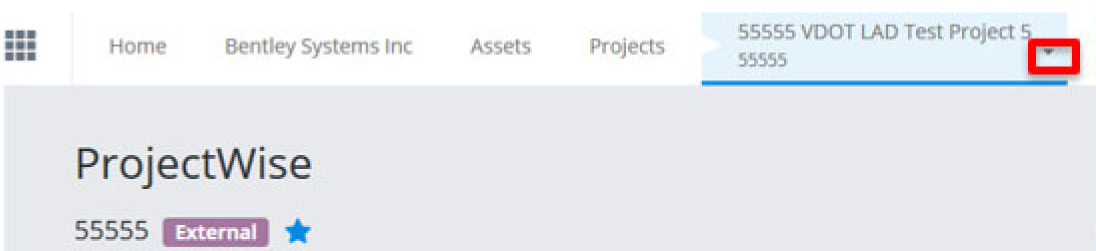
7. Beneath the project information section is the ProjectWise 365 Services panel. This area will vary in content, based on a user's role and assigned permissions within the ProjectWise Portal environment. Currently, primary areas of focus for VDOT Local Administered Projects are, in order of priority: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



8. 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

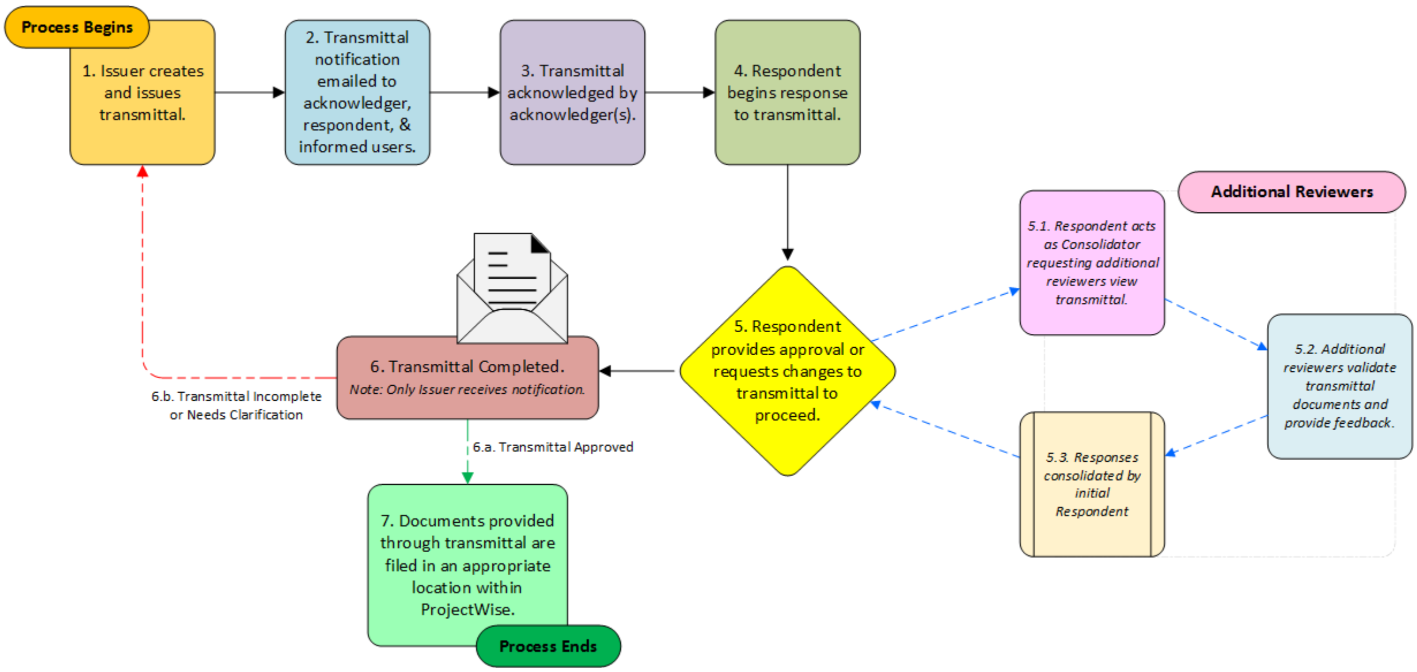
PWDM Transmittal Purposes

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

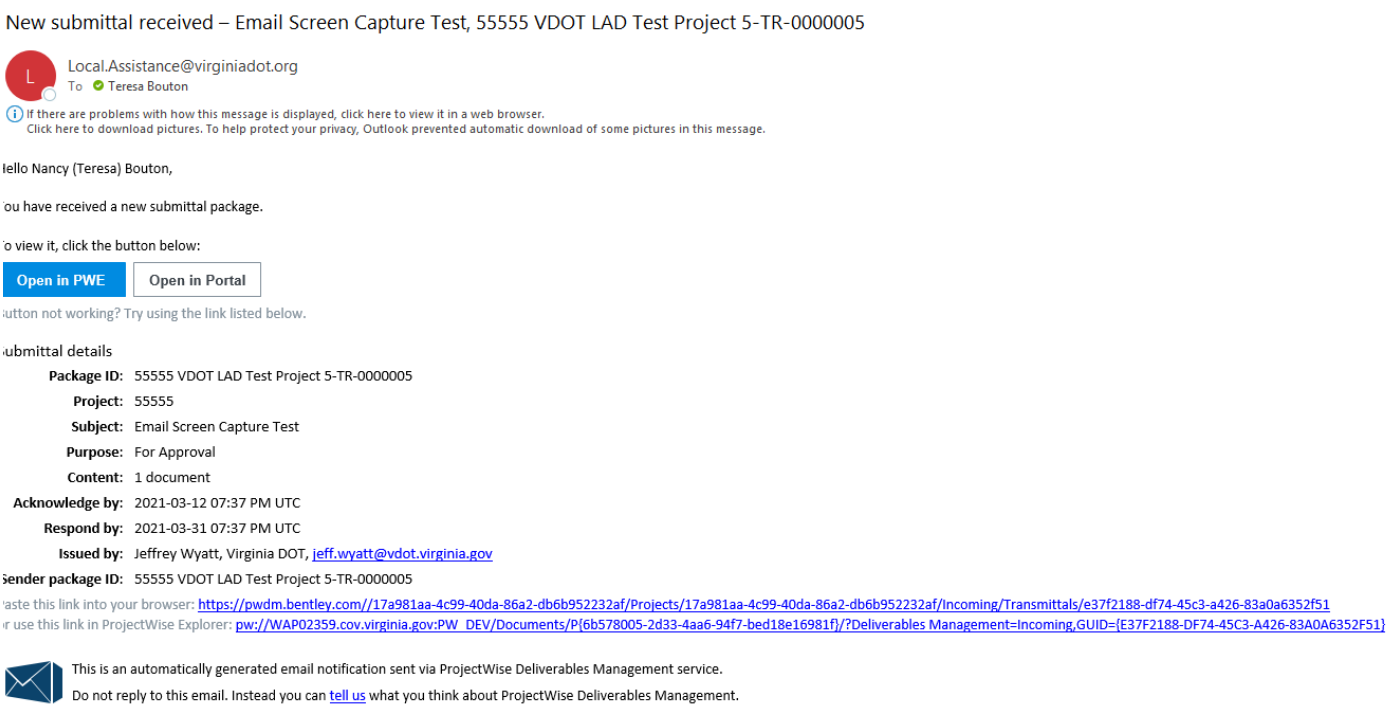
PWDM Transmittal Workflow Diagram



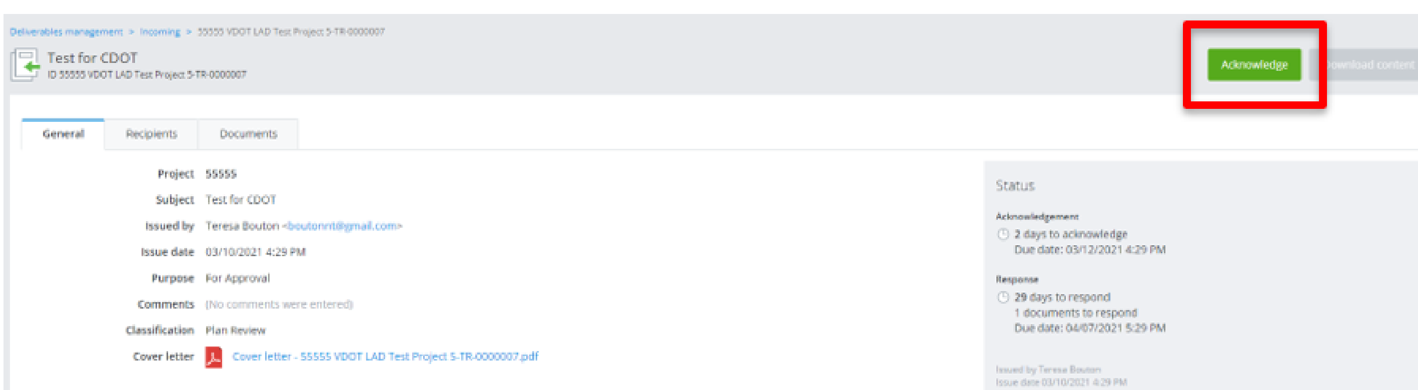
Receiving a Transmittal in the ProjectWise Portal

To receive a transmittal follow these steps:

1. An email will be sent by the ProjectWise Deliverables Management Portal to transmittal recipients.
2. To access the transmittal, click the link provided on the notification email:



3. Once logged into Bentley CONNECT, the transmittal will be loaded.
4. Open the Transmittal and Click the “Acknowledge” button at the top-right of the page to acknowledge receipt of the transmittal:



5. If desired, click the “Cover letter” link to download a local copy and view the cover letter.
6. To view the status of all transmittal recipients’ responses, navigate to the Recipients tab.

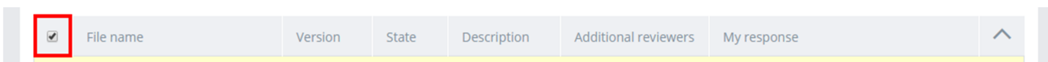
Note: When assigned a role within a transmittal, responses are assigned one of the following states per user:

7. Transmittal attachments may be downloaded individually by navigating to the Documents tab or, in bulk, by clicking the "Download content" button at the upper-right of the page:

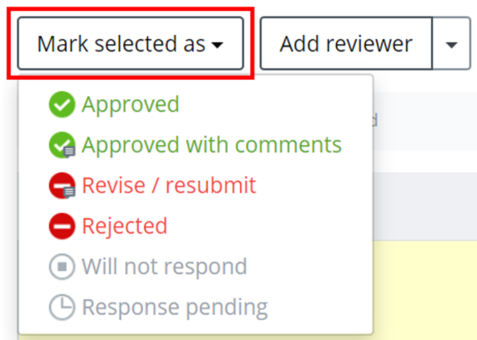
8. Responses from other users may be viewed by navigating to the Responses tab.
9. Click the "Start responding" link or the My responses tab to begin responding to the transmittal.

Note: Please see Adding Reviewers to a Transmittal in the ProjectWise Portal*, if additional reviews are needed by subject matter experts.*

10. It is recommended to review and respond to documents in bulk by clicking the checkbox to the left of "File name", above the transmittal attached files list:



11. Click the "Mark selected as" dropdown at the top-left of the page and select the appropriate response:



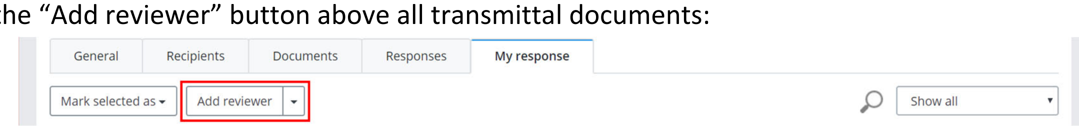
12. Add any necessary comments and attachments to the transmittal response.

Adding Reviewers to a Transmittal in the ProjectWise Portal

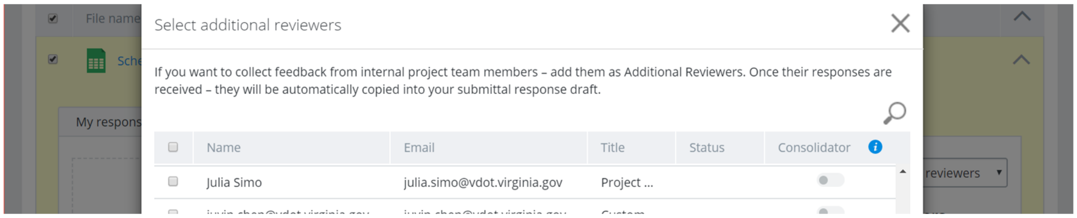
Certain users may need to act as a "consolidator", in that they may need to gather responses from other users not included in the original transmittal. Consolidators / **(Project Coordinators)** will need to combine input from one or multiple other users and provide a summary, if necessary. This could be for several reasons, including that the consolidator is a section point of contact, manager, or document controller. Although it is possible to add reviewers to individual files within a transmittal, it is recommended to add reviewers to all files within a transmittal using the bulk method shown below:

1. Select the checkbox to the left of "File name" at the top-left of the page to select all documents:

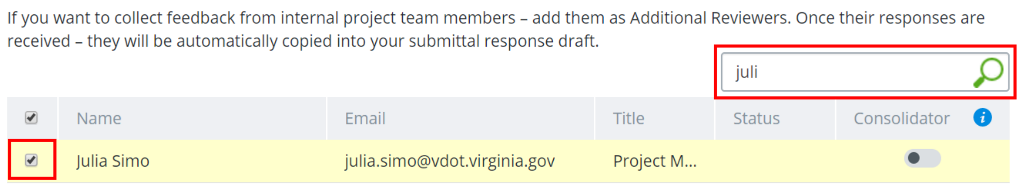
2. Click the "Add reviewer" button above all transmittal documents:



3. The "Select additional reviewers" pop-over will appear:

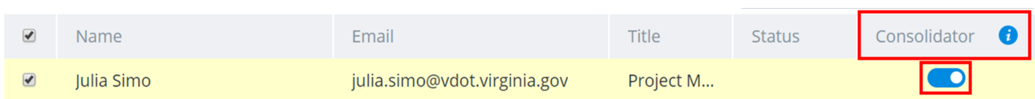


4. Select the appropriate recipients by scrolling through the recipients list and selecting the checkbox to the left of the name of the desired individual users. To search for a user, click on the magnifying glass at the top-right of the pop-over and enter a full (or partial) name or email address:

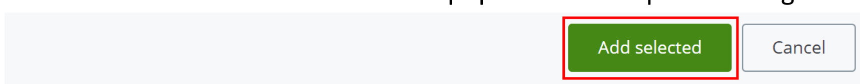


Note: Checking the box to the left of "Name" in the pop-over will select all users.

5. If a selected user should be responsible for consolidating feedback from multiple users, click the "Consolidator" toggle switch so that it changes from grey to blue:



6. Click the "Add Selected" button at the bottom of the pop-over to complete adding users to the transmittal:



Note: When all additional reviewers have reviewed and responded where necessary, the transmittal response may continue as normal.

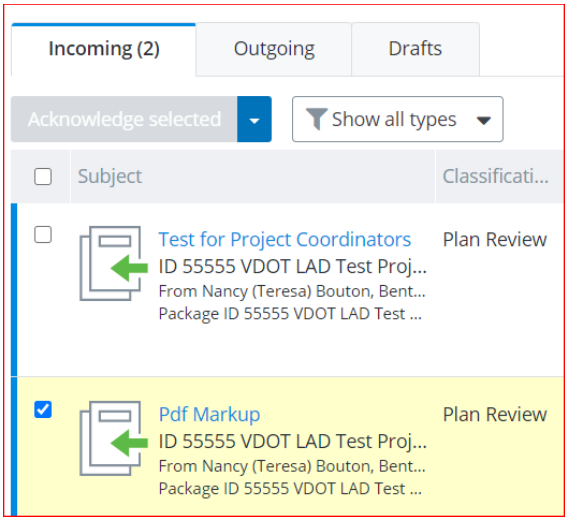
Forwarding a Transmittal in the ProjectWise Portal

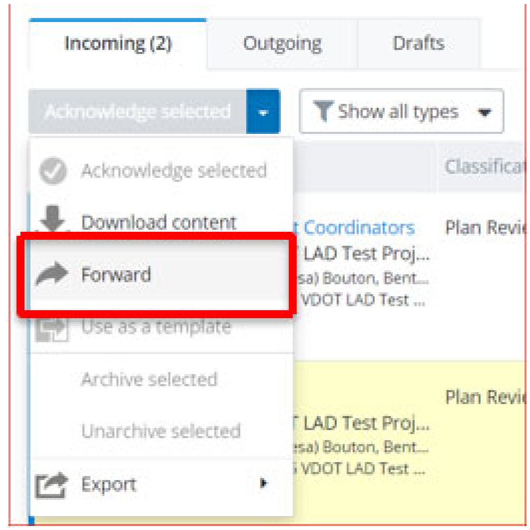
When you forward a submittal, a new transmittal draft is created using the original submittal as a template, and includes the documents from the original submittal. Responses you receive regarding a forwarded submittal will be automatically incorporated into your response to the original submittal.

i.

1. On the incoming tab and acknowledge the submittal, you may not forward a submittal until you acknowledge it
2. Do one of the following:

Click the check box next to the submittal you want to forward and select **Forward** from the action menu.

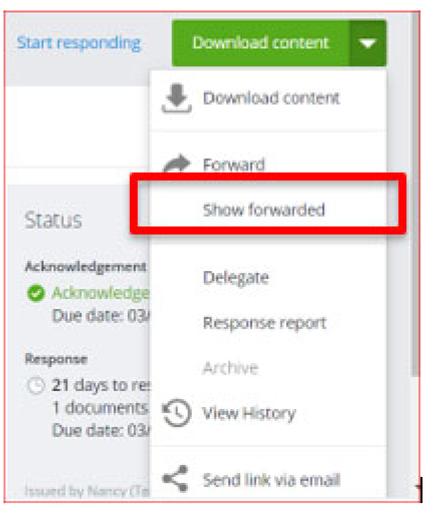




or
Open a submittal from the list (click the link in the Subject column) and select **Forward** from the action menu

In the message that opens select "Forward" again. A new transmittal draft, based on the original submittal, opens for you to configure and issue. Response comments you receive for a document in a forwarded submittal are automatically copied into your own submittal response comments for that document, just like response comments that are received from additional viewers. You can edit these responses as needed when you go to send your response for that submittal document.

To see a list of packages that have been forwarded from a particular submittal and check their status, open the original submittal, then select **Show forwarded** from the action menu (or click the **Show forwarded** button on the **My response** tab).

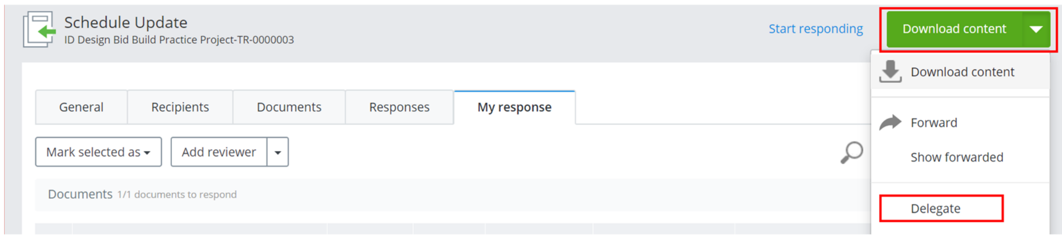


3 The Forwarded packages dialog opens, showing a list of packages, when they were forwarded, and their purpose, status, progress.

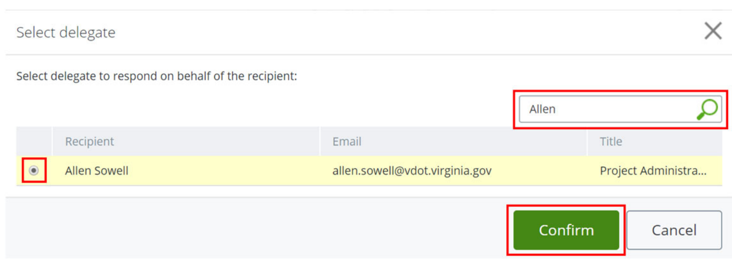
Delegating a Transmittal in the ProjectWise Portal

Delegating a transmittal to another team member may be required for any number of reasons. For example, the document controller / **(Project Coordinator)** may be out of the office and their backup needs to acknowledge or respond to transmittals received. If the Project Coordinator backup received an informational notification, they can open the transmittal through the provided email and then delegate the transmittal to himself or herself or another team member.

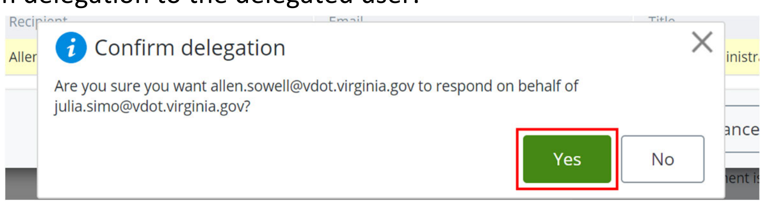
1. As a respondent who needs to delegate a transmittal to another team member:
    a. Click the arrow attached to the "Download content" button.
    b. Click "Delegate" in the dropdown menu:



2. As an "Admin" team member within PWDM who is not a respondent or acknowledger of the transmittal in question:
    a. Click the arrow attached to the "Download content" button.
    b. Click "Delegate" in the dropdown menu.
3. In the "Select delegate" pop-over, find the desired delegate user
4. Select the radio button left of the user's name.
5. Click the "Confirm" button:

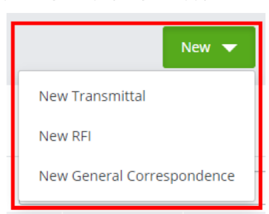


6. Click "Yes" to confirm delegation to the delegated user:

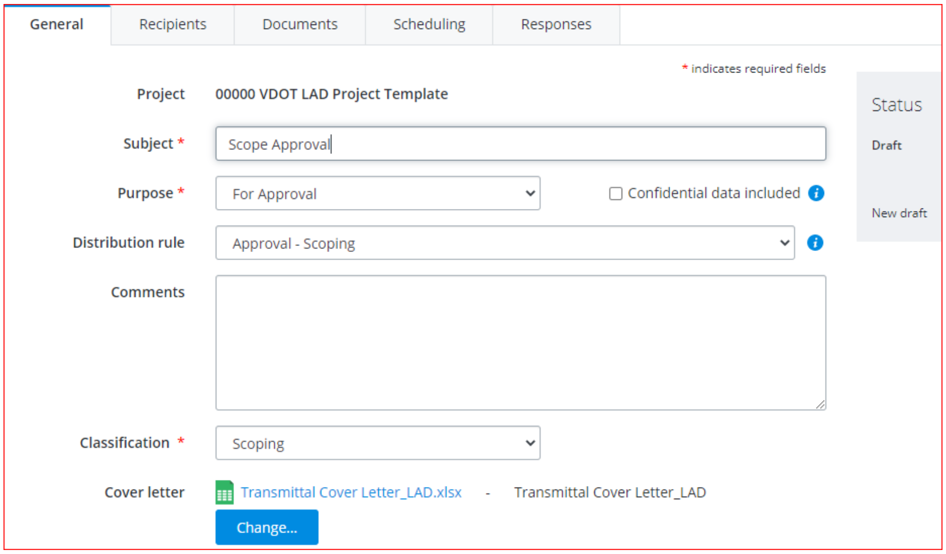


Issuing a Transmittal

1. Click the New dropdown menu and select "New transmittal":



1. The Transmittal draft form will appear:



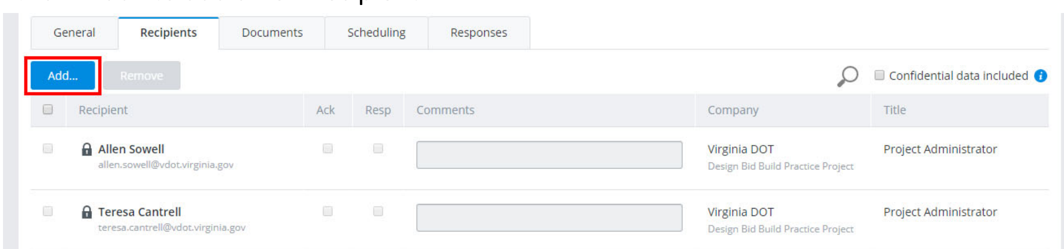
2. Enter a relevant subject for the transmittal, select the appropriate Purpose, Distribution rule and Classification, and enter any necessary comments.

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

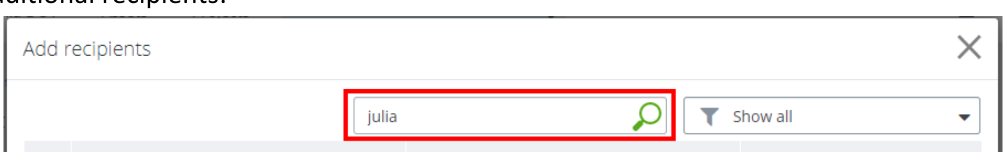
2. Click on the "Recipients" tab to verify recipients to the transmittal. **Localities should not need to add new recipients if the distribution rule is applied to the transmittal.**

Note: If it is necessary to add recipients, follow these steps:

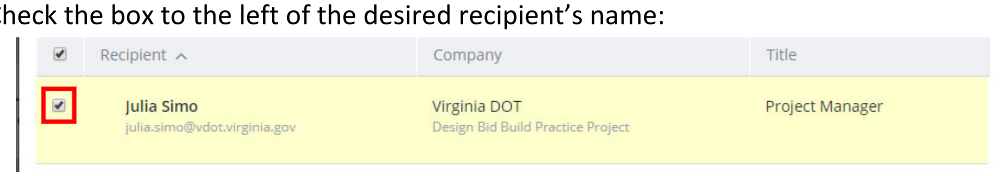
a. Click "Add" to add a new recipient:



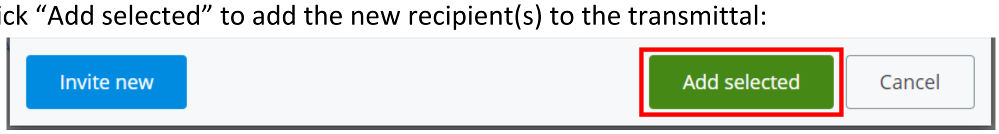
a. Use the magnifying glass to search for a new user or scroll through the available user list to find additional recipients:



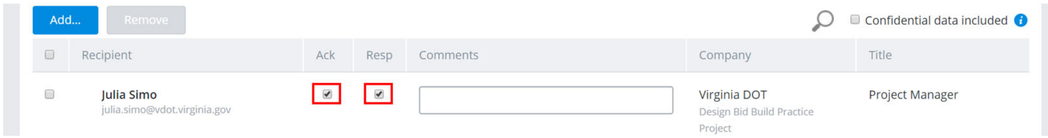
b. Check the box to the left of the desired recipient's name:



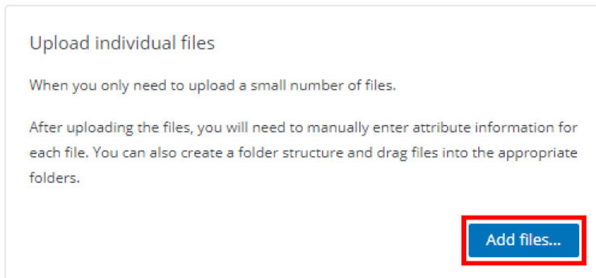
c. Click "Add selected" to add the new recipient(s) to the transmittal:



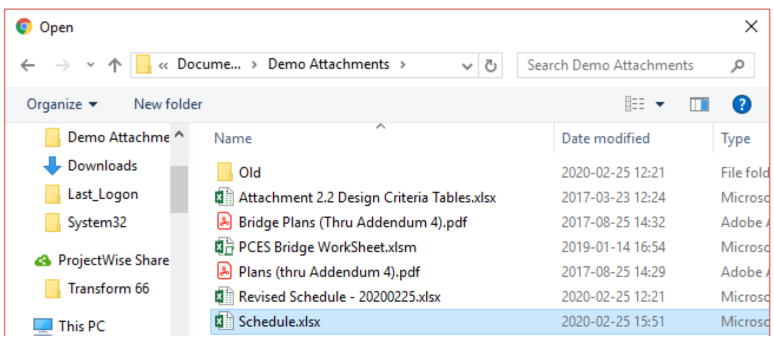
d. If the recipient must acknowledge the transmittal, ensure there is a check in the "Ack" column. If the new recipient must respond, ensure that there is a check in both the "Ack" and the "Resp" columns. If neither is required, ensure that there is no check in either column:



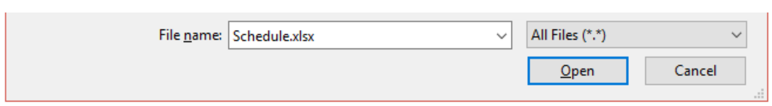
3. Navigate to the "Documents" tab and click "Add files…" to add documents to the transmittal:



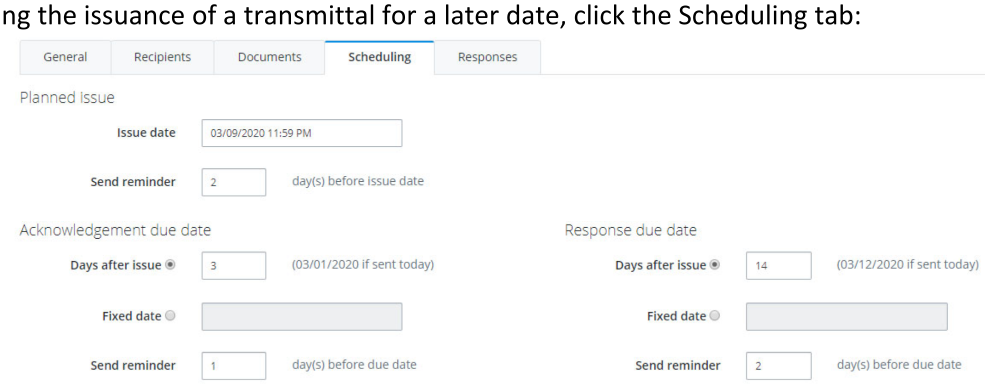
a. Browse to the file(s) desired to be attached using the file browser pop-up window and select one or multiple files:



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

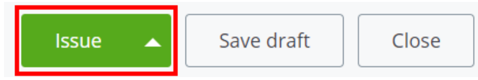


4. If scheduling the issuance of a transmittal for a later date, click the Scheduling tab:

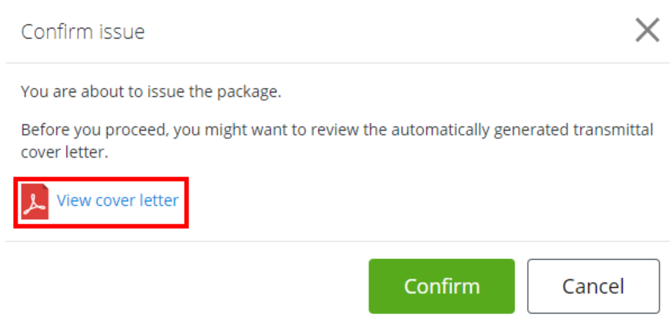


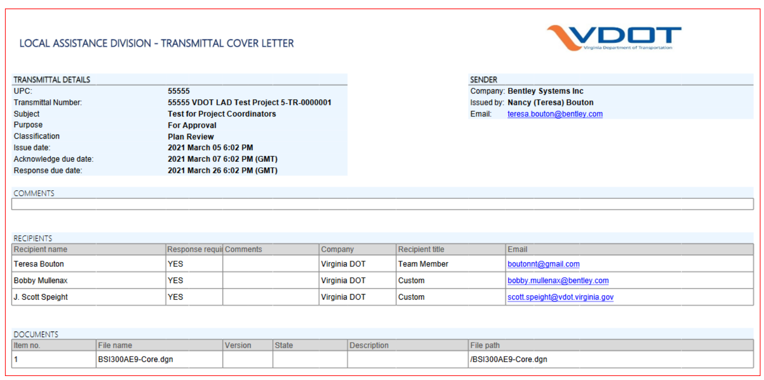
Note: This feature should be used at the discretion of the project coordinator and may vary based on constraints specific to each project. It is recommended to only change the "Issue date" field to the appropriate date/time and not to adjust any other field in *order to maintain the integrity of transmittals 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*

5. When the transmittal is ready for issuance, click the "Issue" button at the bottom of the page:



6. 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:





LOCAL ASSISTANCE DIVISION - TRANSMITTAL COVER LETTER

TRANSMITTAL DETAILS

UPC:	**55555**
Transmittal Number:	**55555 VDOT LAD Test Project 5-TR-0000001**
Subject	**Test for Project Coordinators**
Purpose	**For Approval**
Classification	**Plan Review**
Issue date:	**2021 March 05 6:02 PM**
Acknowledge due date:	**2021 March 07 6:02 PM (GMT)**
Response due date:	**2021 March 26 6:02 PM (GMT)**

SENDER

Company: **Bentley Systems Inc**
Issued by: **Nancy (Teresa) Bouton**
Email: teresa.bouton@bentley.com

COMMENTS

RECIPIENTS

Recipient name	Response requi	Comments	Company	Recipient title	Email
Teresa Bouton	YES		Virginia DOT	Team Member	boutonnt@gmail.com
Bobby Mullenax	YES		Virginia DOT	Custom	bobby.mullenax@bentley.com
J. Scott Speight	YES		Virginia DOT	Custom	scott.speight@vdot.virginia.gov

DOCUMENTS

Item no.	File name	Version	State	Description	File path
1	BSI300AE9-Core.dgn				/BSI300AE9-Core.dgn

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) in the ProjectWise Portal

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

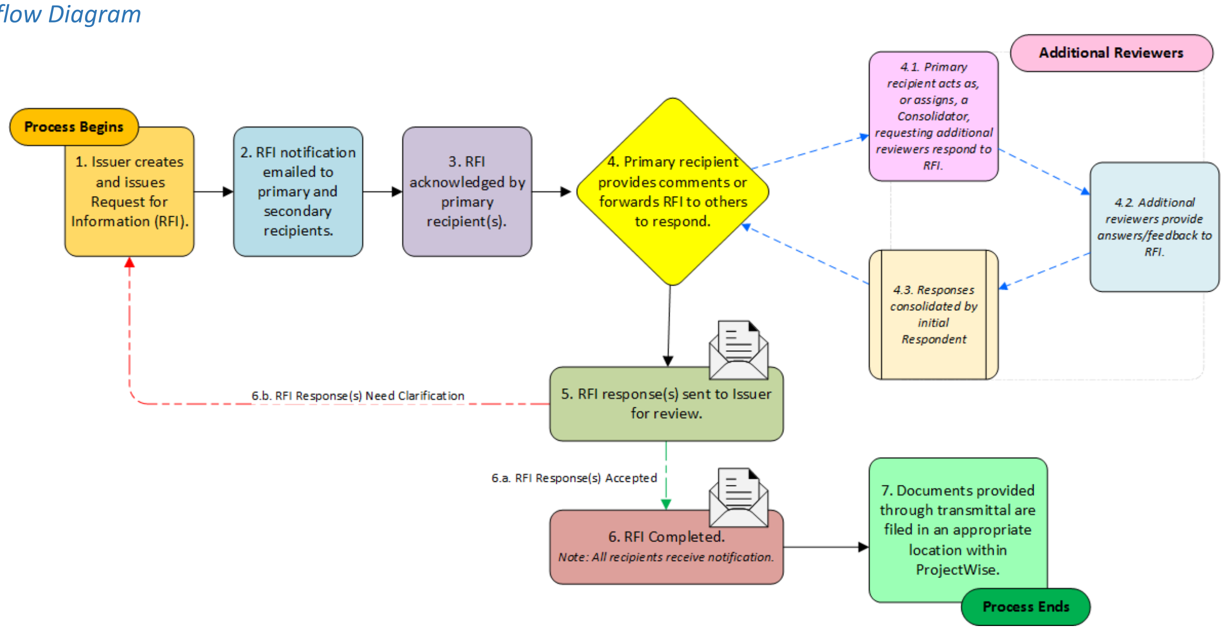
Single response per package from single RFI recipient (cc recipients are kept in the loop but can't respond)

No ability to respond per each attached document

Multiple response cycles until response is accepted

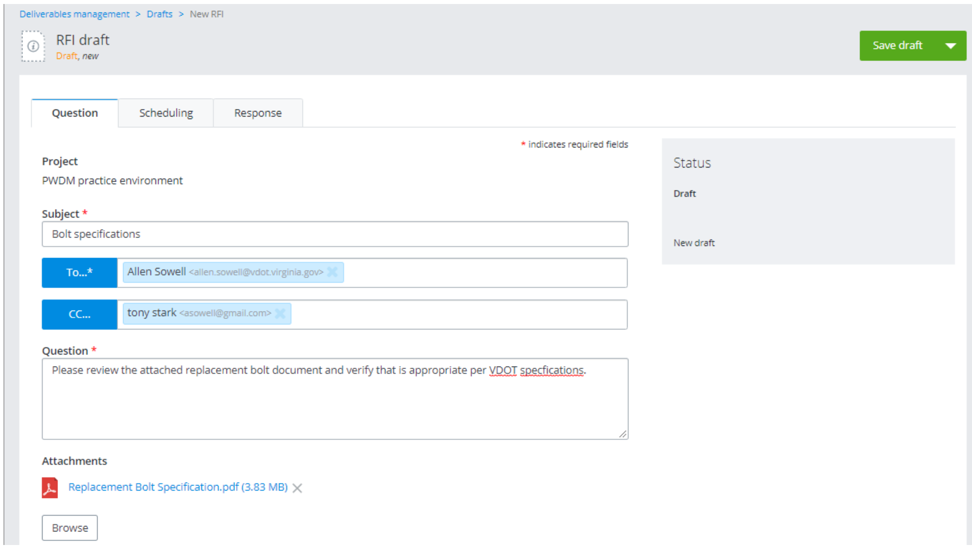
Ability to suggest and finalize impact to help negotiate scope

RFI Workflow Diagram

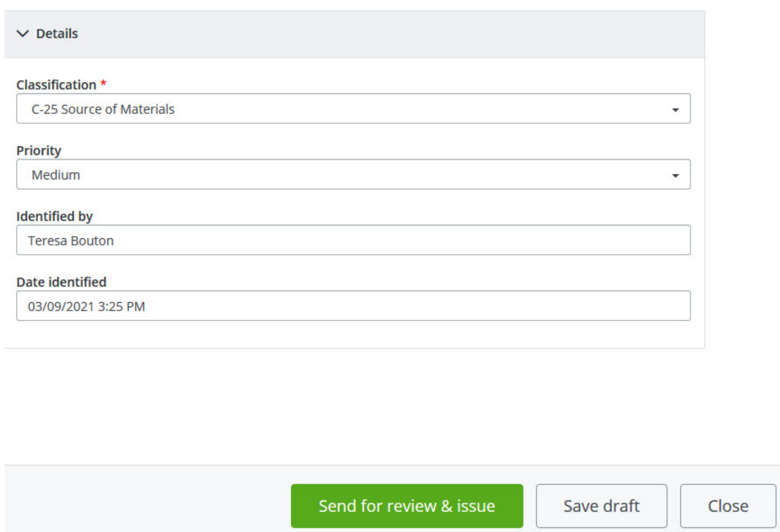


Issuing a Request for Information in the ProjectWise Portal

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):



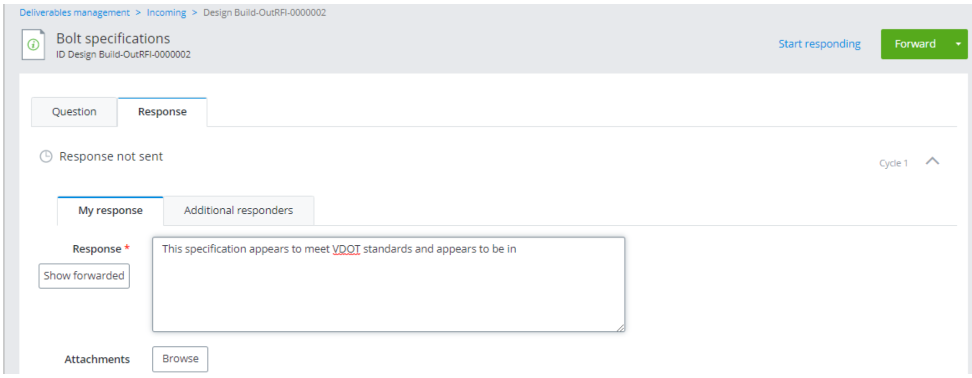
9. When the Request for Information form is completed, click the “Issue” button at the bottom of the page
10. Finally, click “Confirm” at the bottom of the page to send the RFI to its designated recipients.

Receiving a Request for Information in the ProjectWise Portal (Recipient)

Receiving an RFI is extremely similar to the receipt of a transmittal.

1. Recipients will receive an email very similar to the notification sent by PWDM for a standard transmittal. Click the link within the email to view the transmittal in the default web browser.
2. Click the “Acknowledge” button at the upper-right of the Request for Information

3. Click "Start responding" to provide a response to the RFI
4. Enter a response and add any necessary attachments:



5. If additional reviewers are necessary, add them by clicking the "Additional reviewers" tab within the response

Note: For more information on this process, see Adding Reviewers to a Transmittal, above.

6. When complete, click the "Send response" button at the bottom of the page.

Reviewing Request for Information Responses in the ProjectWise Portal (Issuer)

1. A notification email will be received by the issuer of an RFI when responses to the RFI have been received. Click the link within the email to be taken to the RFI within the ProjectWise Portal to review the received responses
2. By default, the link will open the "Question" tab of the RFI. Click the "Review response" button at the top-right of the page, or click the "Response" tab, to view responses to the previously submitted Request for Information.
3. If needed, click the dropdown arrow to expand the RFI. Scroll down and review the received responses.
   a. If all responses are acceptable, click "Accept response"
      i. The RFI process is complete.
   b. To request additional clarification, click "Reject"
      i. The "Reject response" pop-over will appear
      ii. Enter the rejection reason and then click the "Reject" button at the bottom of the pop-over
      iii. *Repeat* the RFI review/clarification process as necessary
4. When complete, a response may be sent to all recipients and the issuer of the RFI.

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.

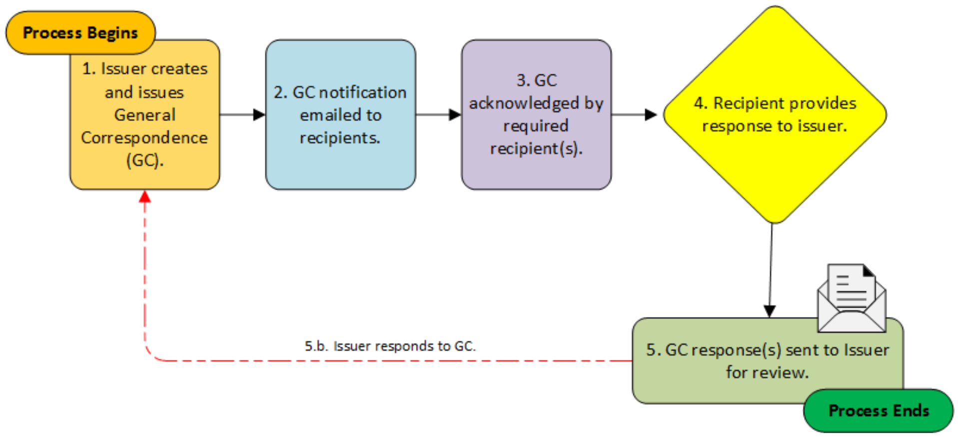
General Correspondence Package - Manage and track all contractual communication using single tool

Multiple responders supported per package. CC recipients may also respond

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

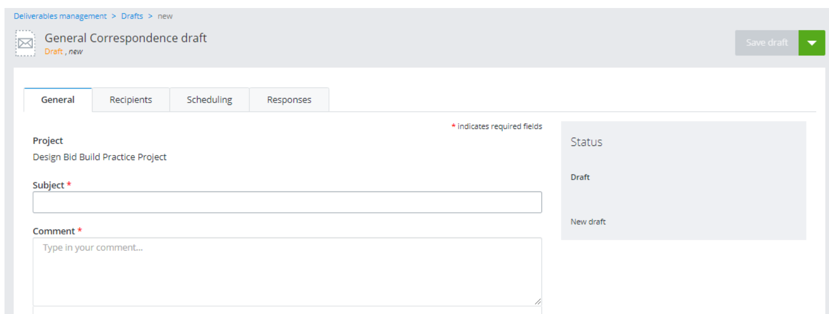
Better than email: Custom form with configurable attributes; Response due dates and reminders: Audit trail

General Correspondence Workflow Diagram



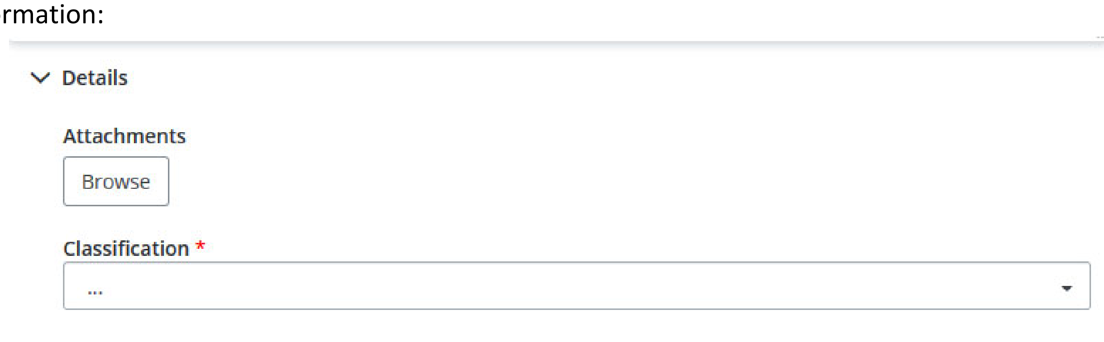
Issuing General Correspondence in the ProjectWise Portal

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.

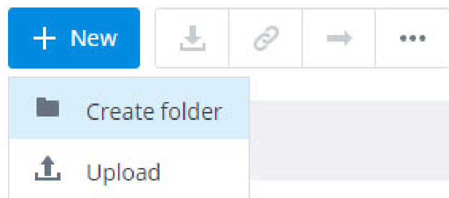
Receiving General Correspondence

1. Recipients will receive an email very similar to the notification sent by PWDM for a *transmittal*. Click the link within the email to view the General Correspondence in the default web browser.
2. Click the "Acknowledge" button at the upper-right of the General Correspondence in order to view attachments and respond, if necessary
3. Click "Start responding" or "Responses" tab to provide a response to the GC
4. View any attachments and provide comments in the "Your response" text field. Add any attachments required by clicking "Browse"
5. Click "Send response" button at the bottom of the page
6. The General Correspondence receipt process is complete.

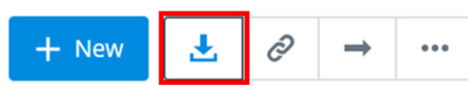
ProjectWise Share

ProjectWise project portal provides the "Share" tool. This is a common file storage area for collaboration which is available on the web. Share should only be used for non-sensitive data and documents that require the input of multiple users. Share offers extremely limited permission controls. As such, it is recommended that the use of Share be limited to over-the-shoulder reviews prior to issuing a transmittal, or, in the case of a Design Build project, the materials notebook.

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

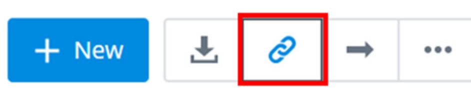


2. Clicking on the names of files or folders will open them. Microsoft Office (Word, Excel, etc.) files will open, by default, in Microsoft Office 365 web-mode. PDF files will open, by default, within the *PDF Markup Tool*.
3. To download one or multiple files to a PC or mobile computing device, place a check in the checkbox next to each of the desired files, then click the Download button:



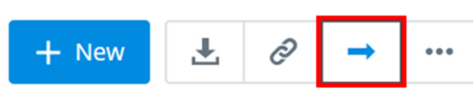
Note: Multiple file/folder selections will be zipped into a file named "ShareFiles.zip" which may be saved to a local drive.

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:

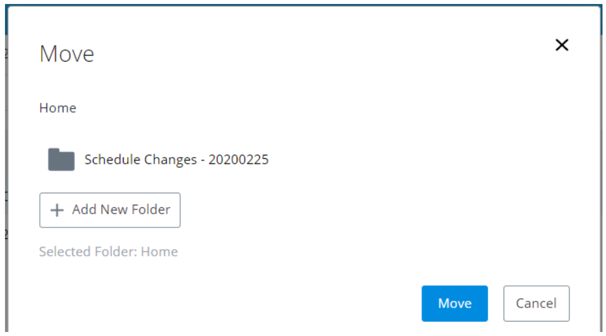


Note: When clicked, the link to the file may be pasted into an email or document. Use [CTRL+V] or right-click the mouse and select "paste" on a Windows computer to use this feature.

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:

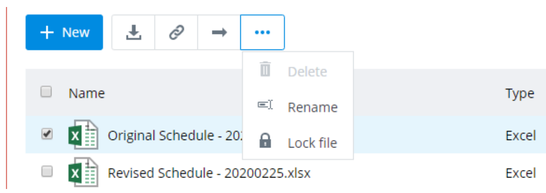


Note: Additional folders may also be created after clicking the Move button:

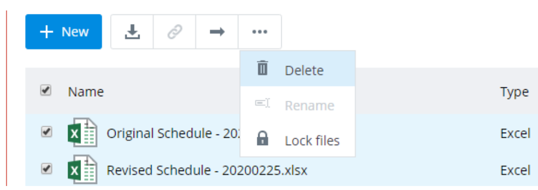


6. Additional options are available via the ellipsis menu:

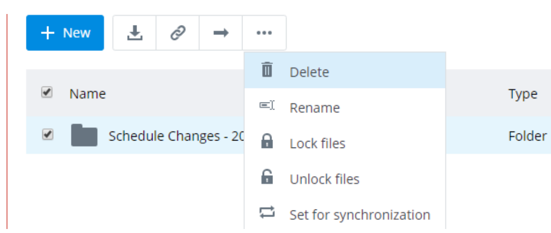
   a. Non-Admin users may not delete files, but they may rename or lock files, as needed:



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



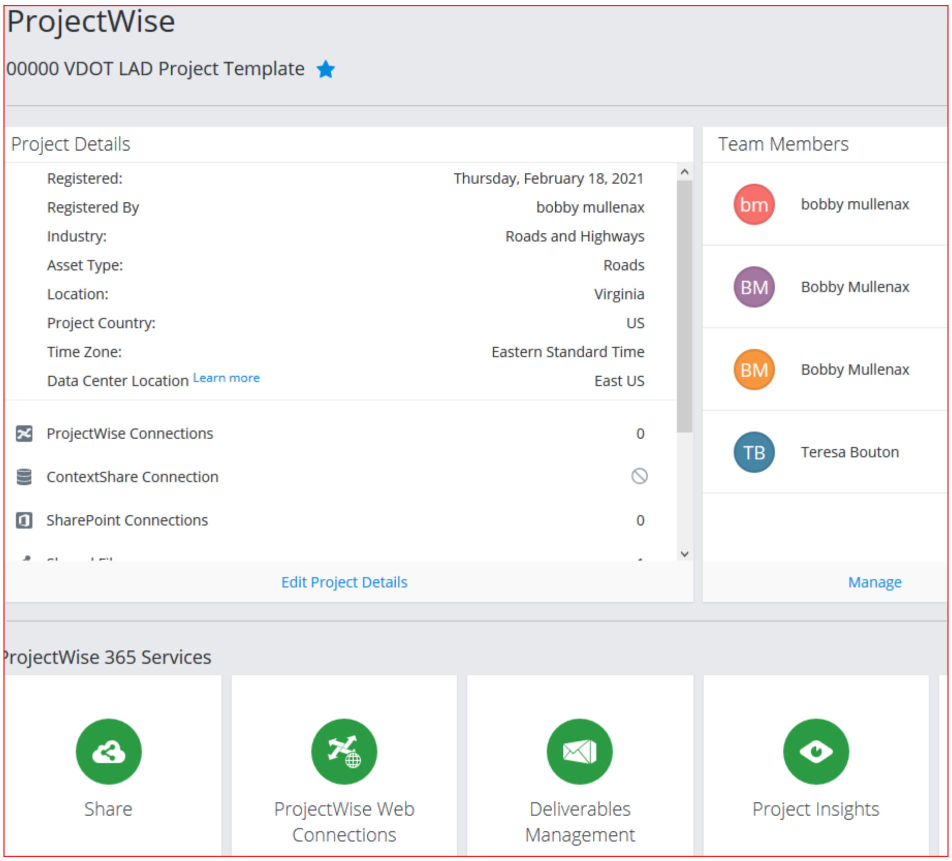
   c. Users may delete, lock, unlock, and set synchronization status on folders, via the ellipsis menu:



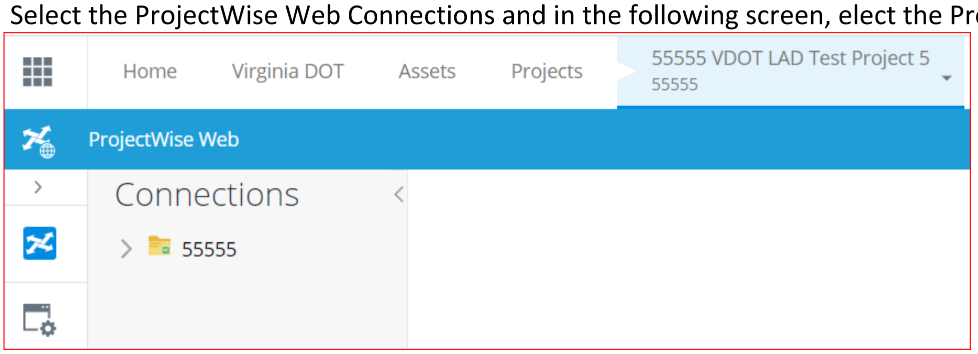
ProjectWise Web Connections

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

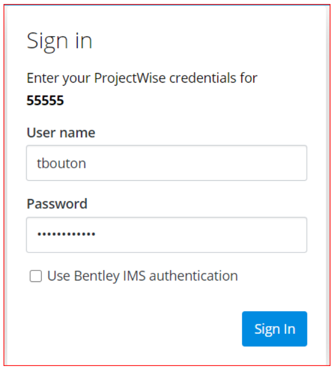
1. Log onto Bentley Connect (*https://connect.bentley.com*)
2. Navigate to the appropriate project, then to "ProjectWise Web Connections" located in the ProjectWise 365 Services section of the project portal page and select your Project:



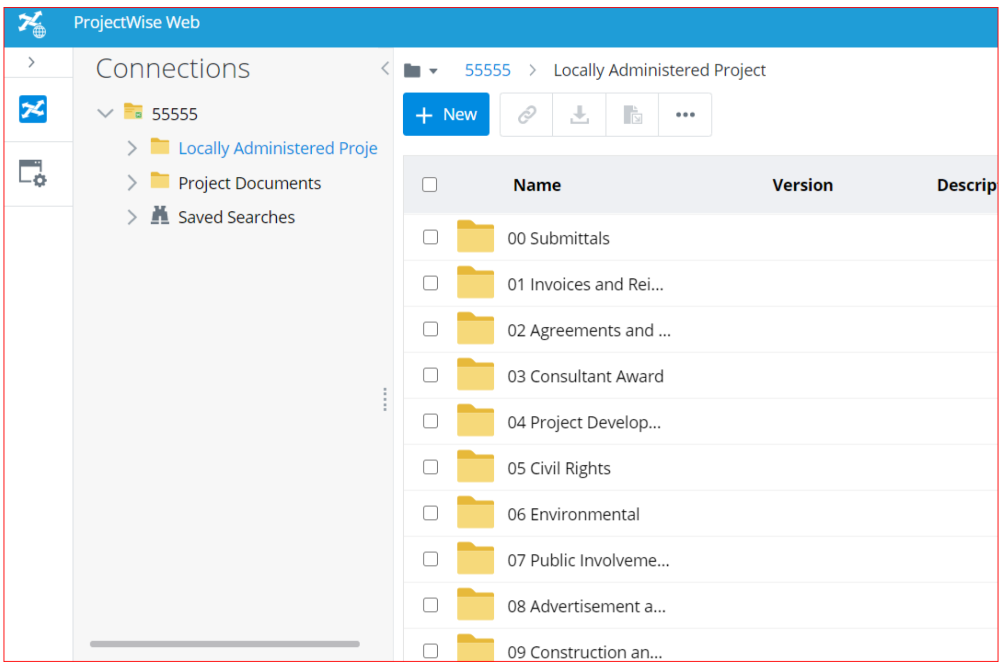
3. Select the ProjectWise Web Connections and in the following screen, elect the Project number to expand



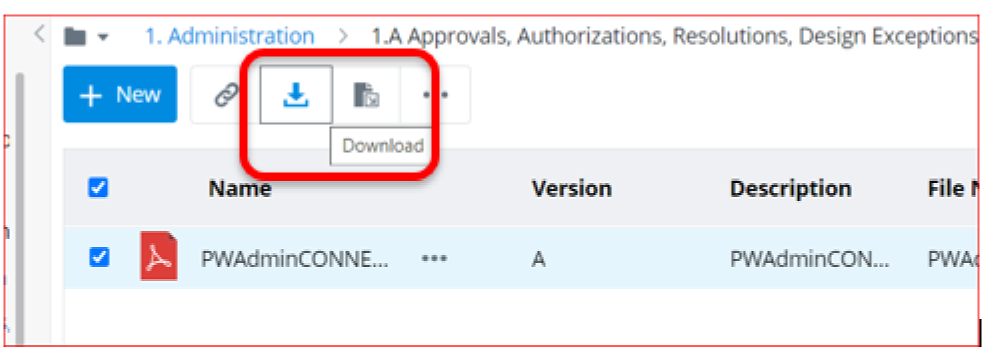
4. You will be required to enter your username and password



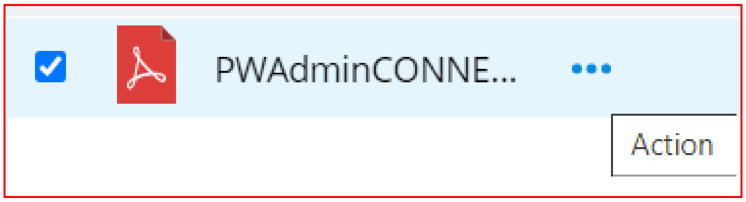
5. You will now see your ProjectWise folder structure displays just like the ProjectWise Explorer. Your permissions are the same as they are in ProjectWise Explorer.

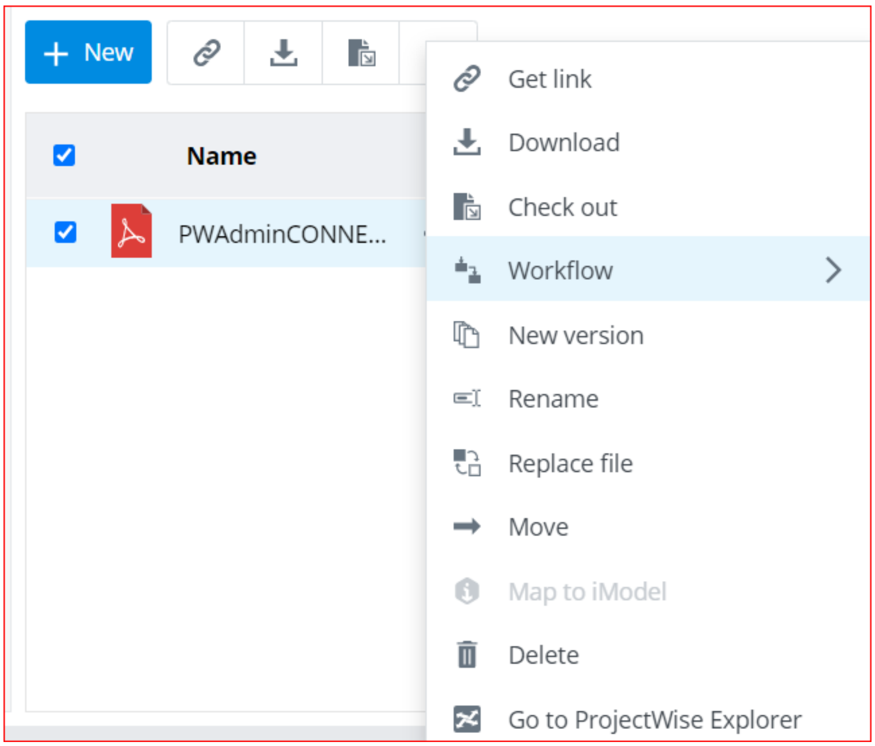


6. Keep expanding the folder structure and navigate to the intended folder and select the document, now choose download tool to copy to your computer to open



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



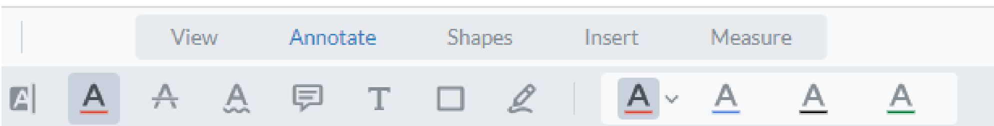


PDF Markup Tool

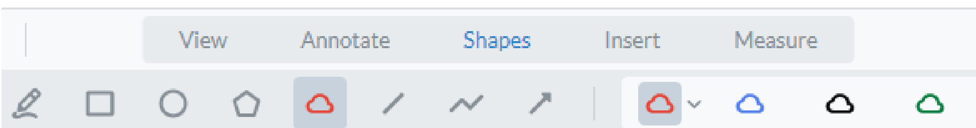
Within the Bentley ProjectWise project portal is an embedded PDF markup tool. The PDF Markup tool is accessible in "Share" and "ProjectWise Web Connections" with read-write capabilities, where possible. From within either application, click the filename of a PDF document to access the PDF Markup tool.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

View – Zoom in and out, pan and highlight with selection tool

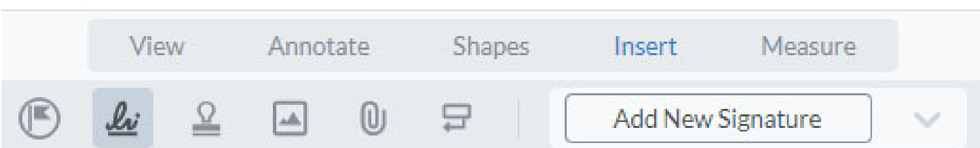
Annotate pdf with highlighting, strike through, underlining, add notes



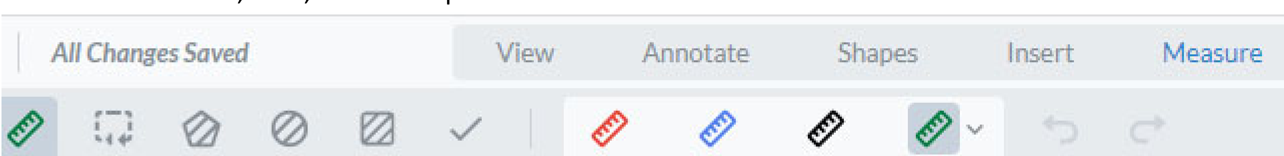
Shapes – Add clouds, shapes and draw freehand elements



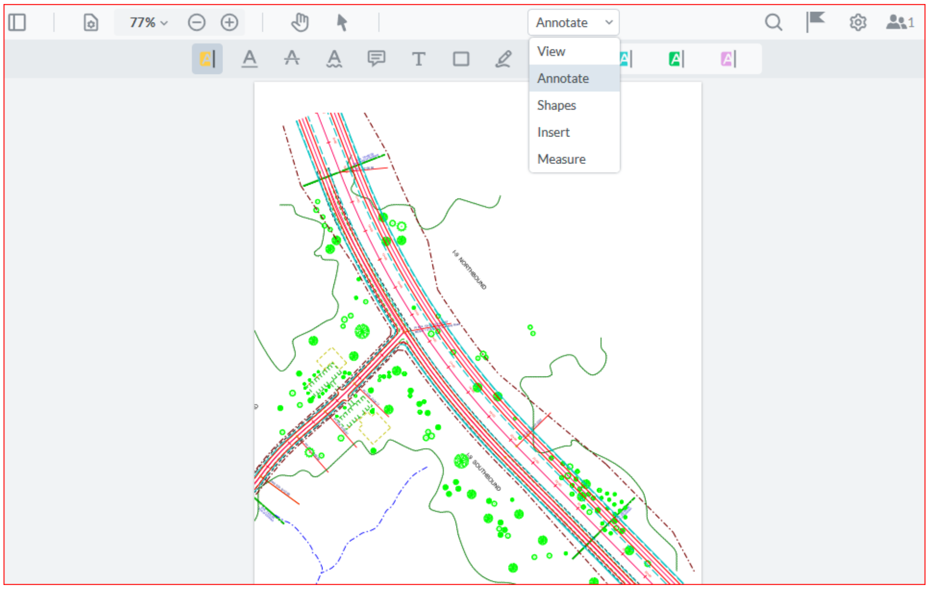
Insert – Add and track an issue, signature, stamp, rubber stamp, insert documents and add callouts



Measure – Distance, area, count and perimeter



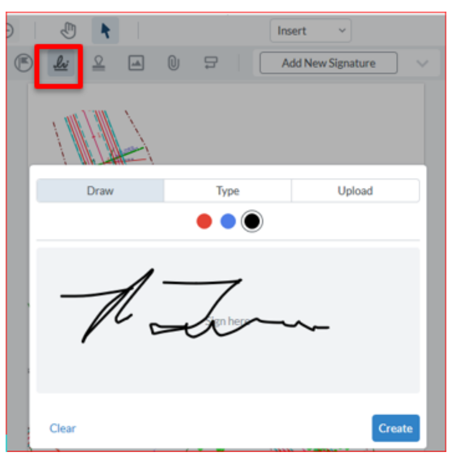
1. When the user has modify/write permissions, the PDF markup tool will appear as follows:



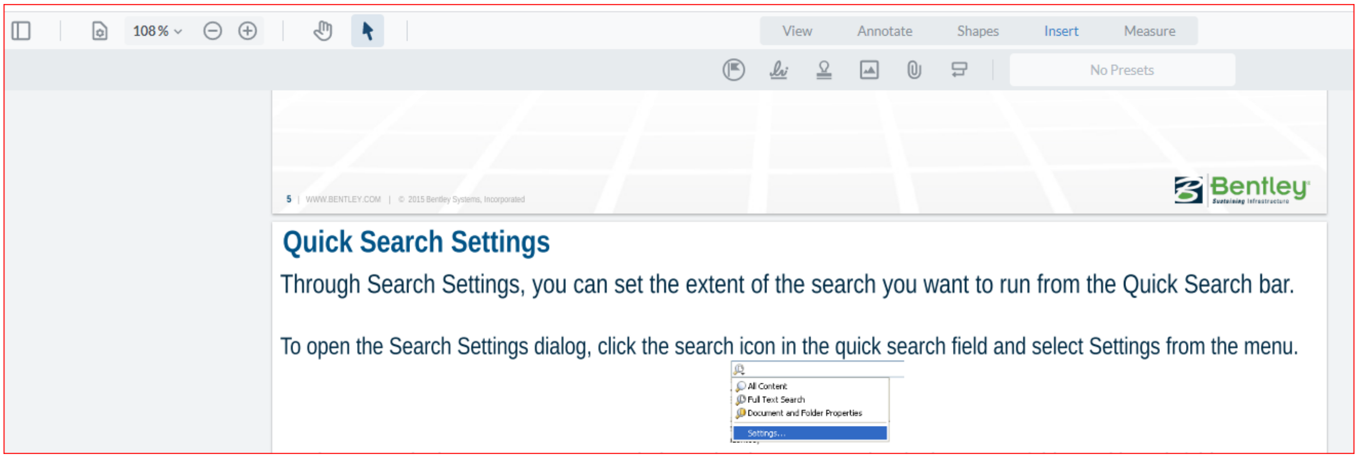
Note: In ProjectWise Web Connections, the PDF markup tool will require a user to log in using his/her COV account credentials.

2. 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.:

3. 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:



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



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

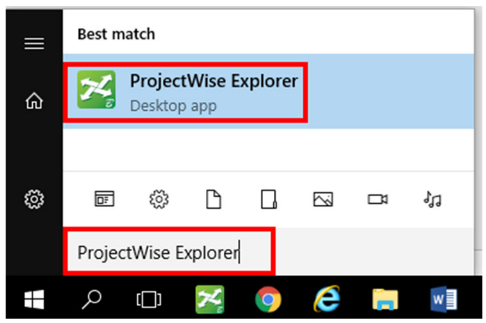
Note: The PDF markup tool does not modify original documents, but adds a transparent overlay, which contains and allows the display of user markup data.

ProjectWise Explorer

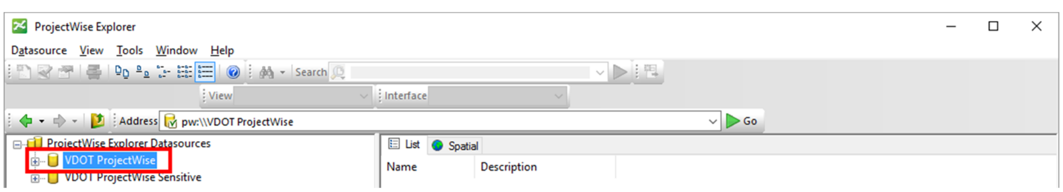
You will have the ability to use Deliverables management in the Portal as well as within ProjectWise Explorer. The desktop ProjectWise Explorer client is an extremely useful tool within the ProjectWise suite. It provides many of the same services as the ProjectWise portal online, but with a greater focus on document management. Although it is feasible to both issue and receive transmittals and Requests for Information (RFI) through ProjectWise Explorer, it is recommended to use the web Portal for most of this functionality. This section is provided to demonstrate and advise on the current capabilities of the ProjectWise Explorer client for PWDM.

Accessing ProjectWise Explorer

1. Open the ProjectWise Explorer client by opening the Windows Start menu and typing "ProjectWise Explorer" or navigating to *Start > Bentley > ProjectWise Explorer*:
2.

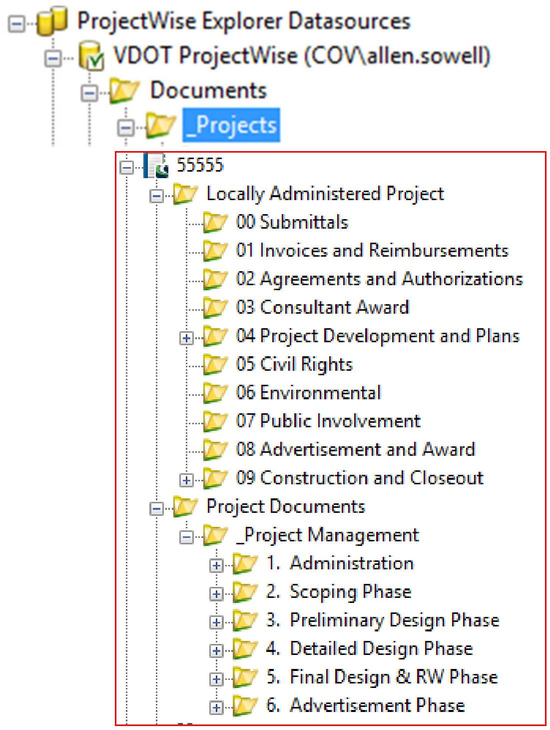


3. The ProjectWise Explorer window will open. Double-click on the appropriate datasource connection in the navigation panel on the left of the ProjectWise Explorer window. By default, VDOT projects are located in the VDOT ProjectWise datasource:

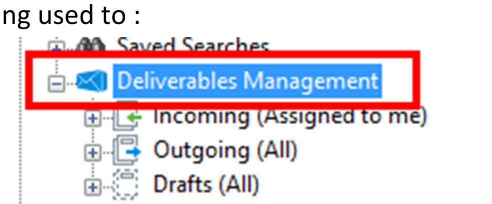


Note: If required, log into the ProjectWise datasource using your COV account username and password. (Logon format: cov\firstname.lastname*)*

4. Project data and folders are accessible in ProjectWise Explorer by navigating to:
   VDOT ProjectWise > Documents > _Projects > [District] > [Project UPC Number]

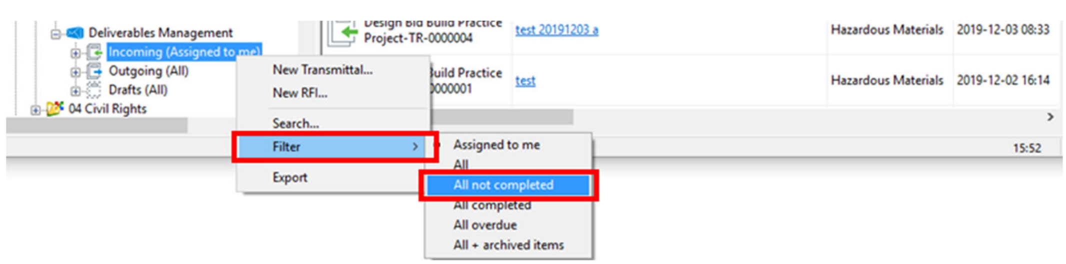


5. ProjectWise Deliverables Management is accessible via the ProjectWise Explorer client. If the PWDM application is installed on the computer being used to :



6. To view Inbound transmittals, click on “Incoming” beneath Deliverables Management for the selected project

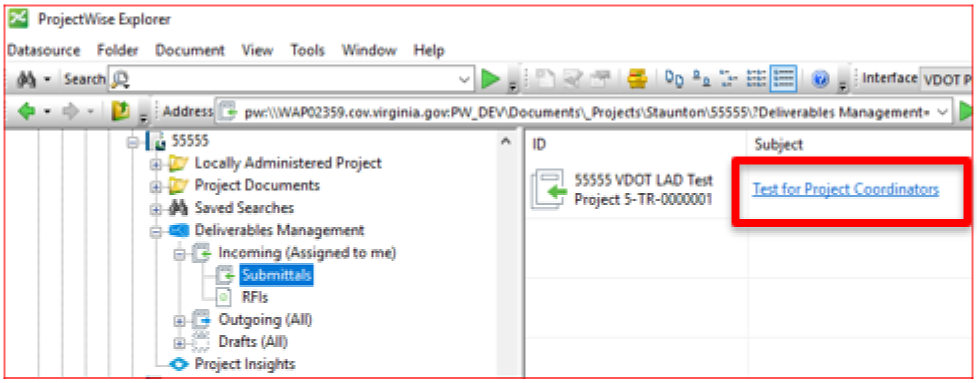
7. By default, the filter on the Incoming folder will be set to “Assigned to me”. To change this, right-click on Incoming, using the mouse, hover over “Filter”, and select the appropriate status from the pop-out menu:

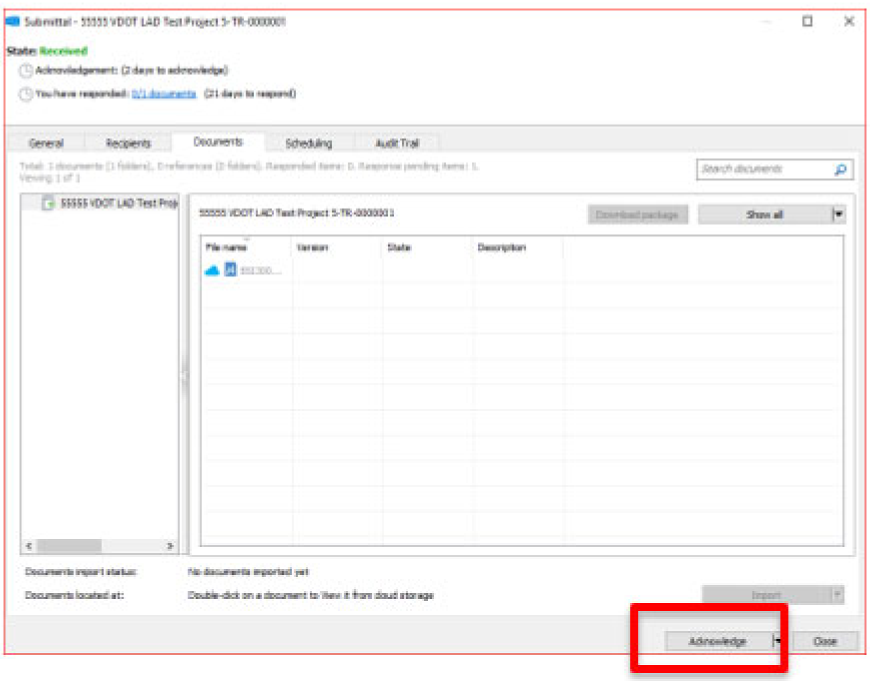


Importing Documents into ProjectWise Explorer

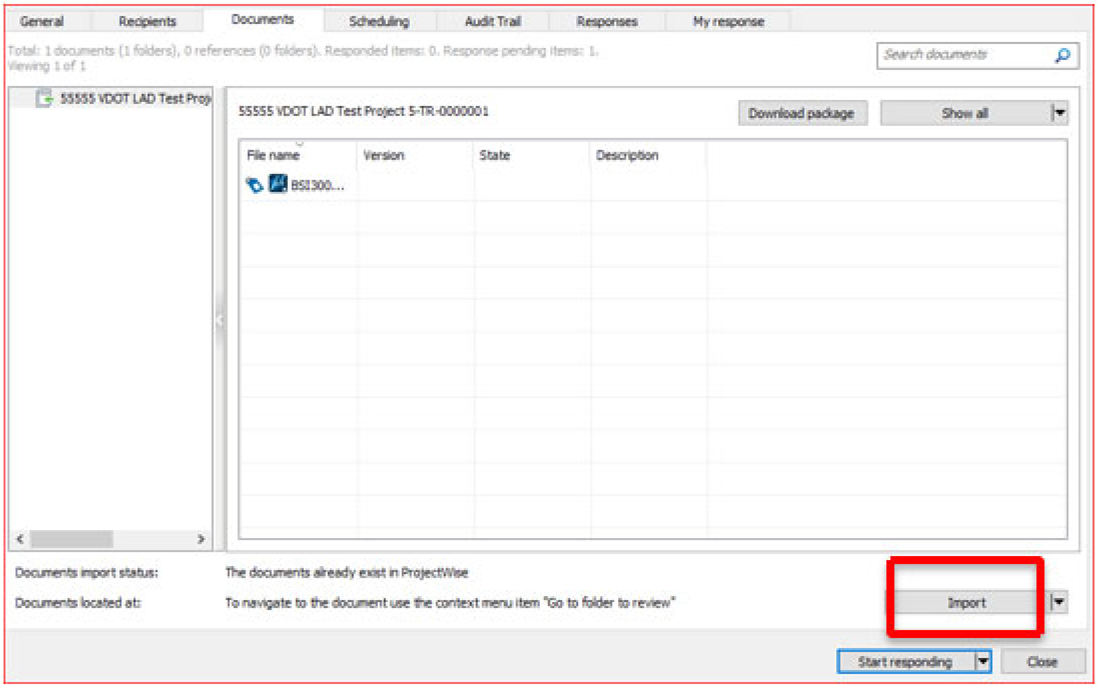
When transmittals or Requests for Information (RFIs) are received through the web-based ProjectWise Deliverables Management application, it may be necessary to import documents from a transmittal into ProjectWise Explorer for long-term storage. To import documents from ProjectWise Deliverables Management into ProjectWise Explorer folders:

1. Navigate to the appropriate project's Deliverables Management folder, then to Incoming, and open the desired transmittal. Navigate to the Documents tab and Acknowledge the Submittal, then you will be able to Import the file into ProjectWise

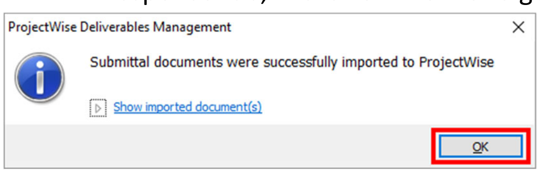


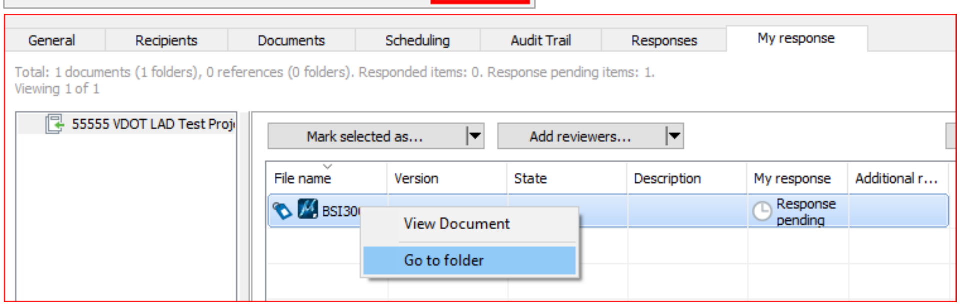


2. Click the "Import" button, near the bottom of the window:

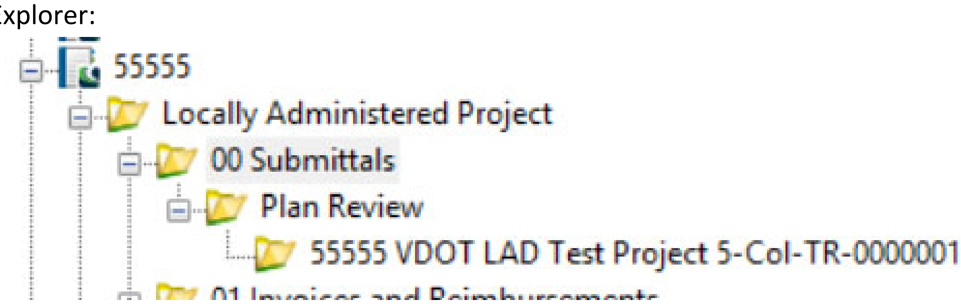


3. Click “OK” on the pop-up stating that “Submittal documents were successfully imported to ProjectWise”: In My Response tab, rt click on the file to go to the folder it was imported in to





4. The documents will be placed in a storage folder, typically named “00 Submittals” it will categorize them by Classification/Transmittal ID within the Submittals folder. Users in the project’s PW_LAD_ProjCoordinator user list will have permissions to cut documents and paste them into their final destination within ProjectWise Explorer:



5. Paste the document(s) in question into their long-term storage folder within ProjectWise Explorer.

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: **Local.Assistance@virginiadot.org**

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

Appendix A: Additional Resources

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*

Working through ProjectWise Explorer *https://youtu.be/4UmJ6dHcmNQ*

Appendix B: ProjectWise Administration & Support

LAD and Cadd Support

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

New Project Request

Time to setup a new project within ProjectWise is typically within five (5) business days.
To set a new project up, please enter a request by emailing the following information to the Cadd Support team (*caddsupport@vdot.virignia.gov*) containing the following information:

1. Project UPC
2. Project Description
3. Project Manager
4. Estimated project start/end date
5. Enable web access?
6. Enable ProjectWise Deliverables Management?

Note: Web access to the ProjectWise Portal will be enabled by default for all projects using PWDM.