

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 Team Members and Reviewers of submittal working on Locally Administered Projects for the Virginia Department of Transportation.

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ProjectWise Portal

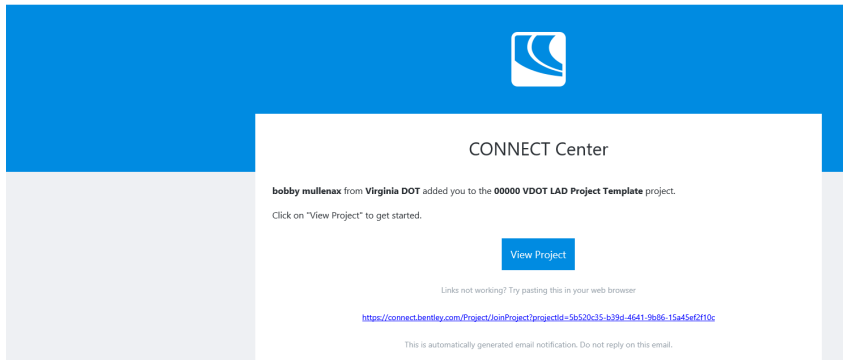
ProjectWise Deliverables Management (PWDM) is the primary method of submitting and receiving submittals for Virginia Department of Transportation - Locally Administered Projects (LAP). The ProjectWise Deliverables Management rules engine uses a Distribution Matrix, which should closely resemble a project’s 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

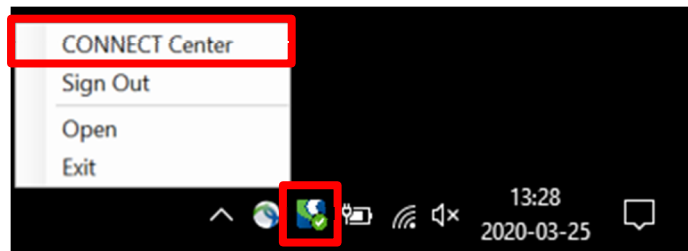
Fwd: bobby mullenax from Virginia DOT added you to the '00000 VDOT LAD Project Template' project.

 Teresa Bouton <boutont1@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: 'boutont1@gmail.com'

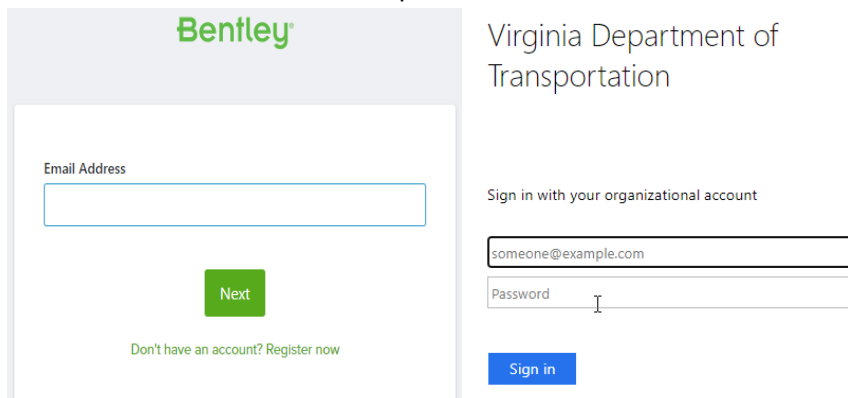


Accessing the ProjectWise Portal

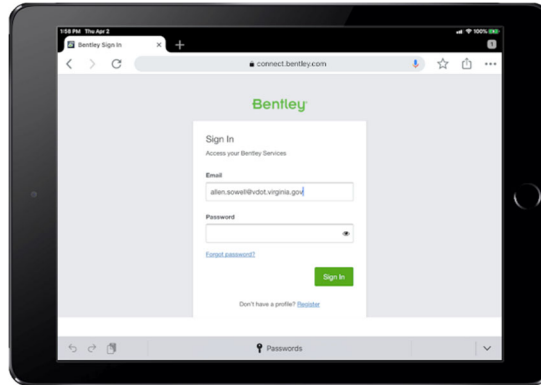
1. Log into Bentley Connect. There are multiple ways in which to log into the Bentley ProjectWise Portal.
 - a. Click the Bentley Connection client icon in the system tray (bottom-right, near the clock). Then click "CONNECT Center". This will open the default web browser and sign the current user in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



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

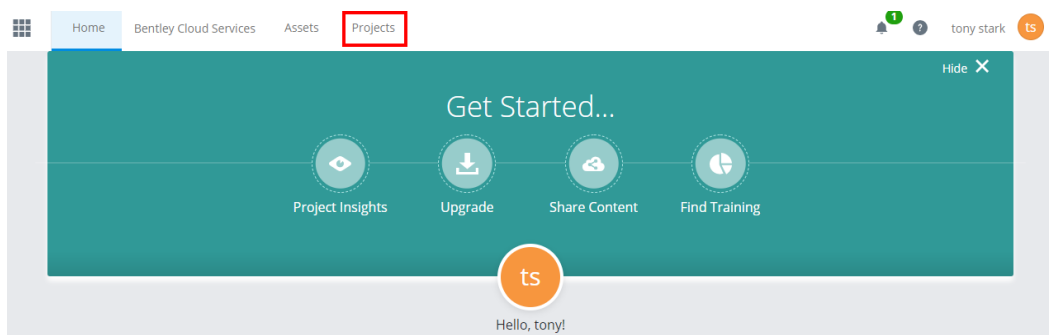


- c. To use the ProjectWise web application on a mobile device (iPad, iPhone, or Android), VDOT staff members should log into <https://connect.bentley.com> using their full VDOT email address:

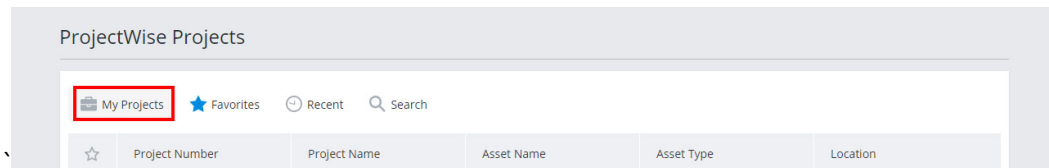


Note: It is recommended to use the Google Chrome browser to access the ProjectWise Portal on either Windows computers or mobile devices.

- 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.

The screenshot displays the ProjectWise interface with three main panels: Project Details, Team Members, and Notifications.

Project Details:

Registered:	Wednesday, September 18, 2019
Modified:	Monday, December 9, 2019
Registered By:	Allen Sowell
Industry:	Roads and Highways
Asset Type:	Roads
Location:	1401 E Broad St Richmond, VA 23219
Project Country:	US
Time Zone:	Eastern Standard Time
Data Center Location	Learn more East US

Connections:

ProjectWise Connections	0
ContextShare Connection	0
SharePoint Connections	0
Shared Files	0

Team Members:

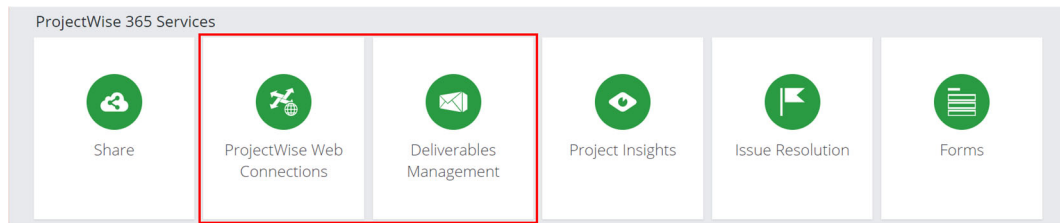
- ts tony stark

Notifications:

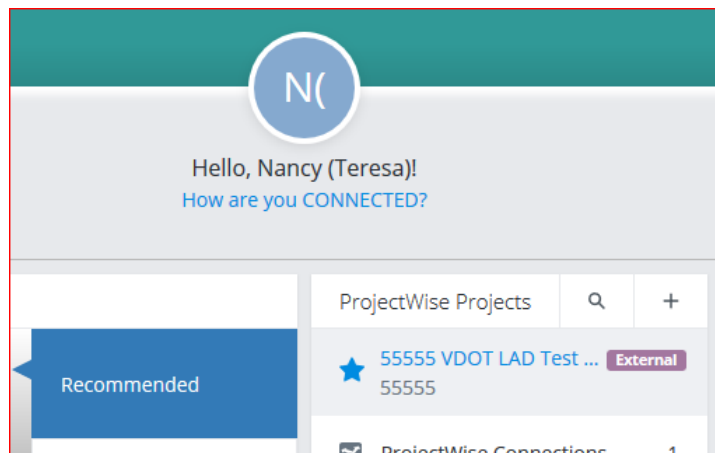
Wednesday, February 19, 2020 02:01 PM

Allen Sowell from Virginia DOT added you to the 'Design Bid Build Practice Project' project.

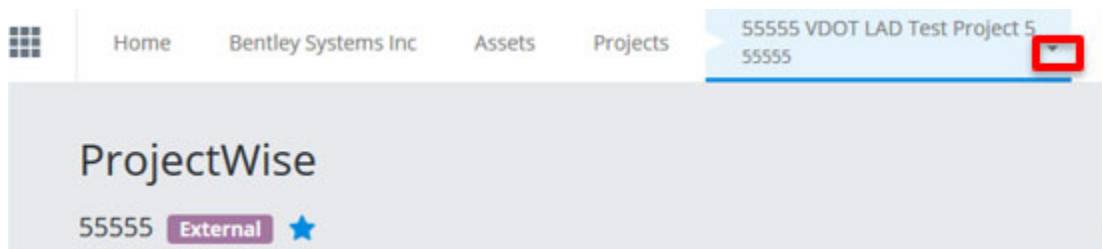
- 7. Beneath the project information section is the ProjectWise 365 Services panel. This area will vary in content, based on a user’s role and assigned permissions within the ProjectWise Portal environment. Currently, primary areas of focus for VDOT Local Administered Projects are, in order of priority: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

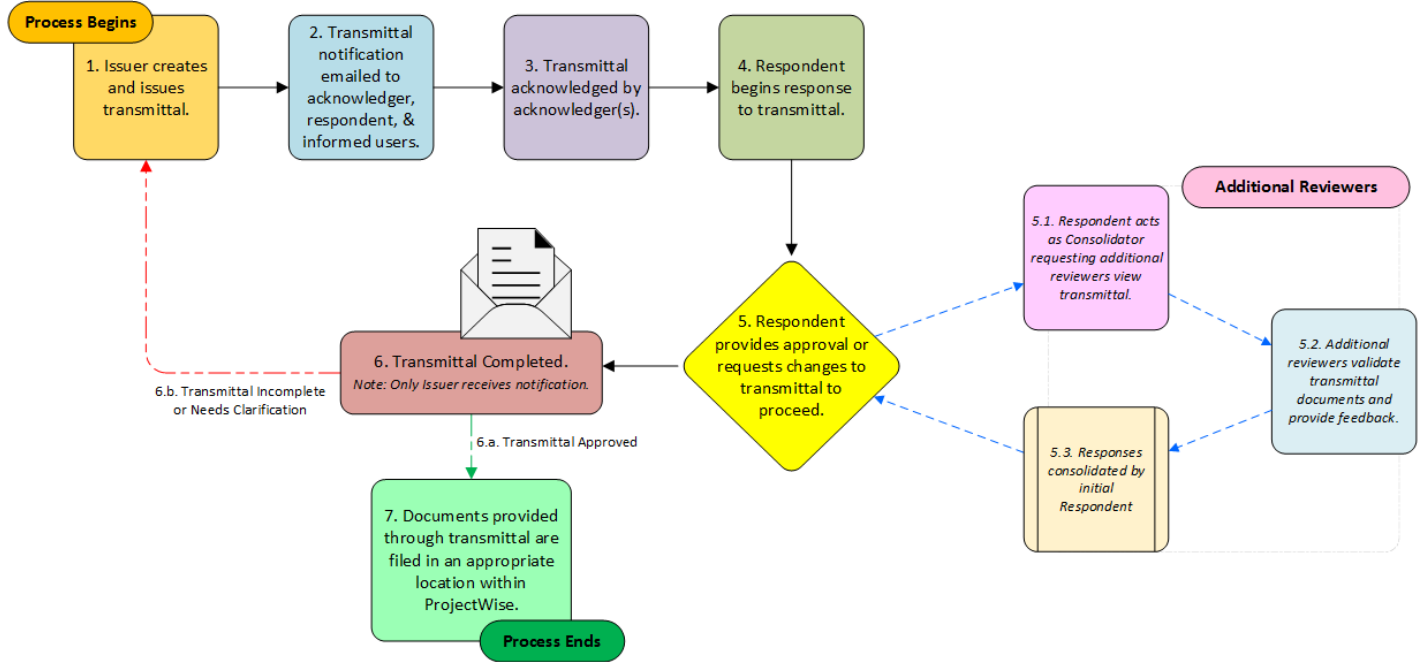
PWDM Transmittal Purposes

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)
Classification	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

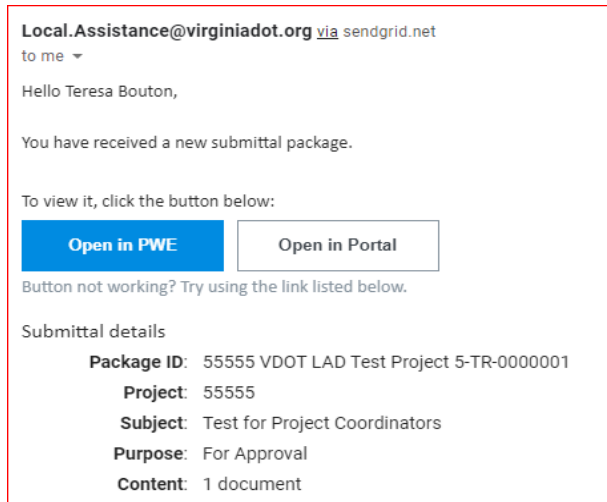
PWDM Transmittal Workflow Diagram



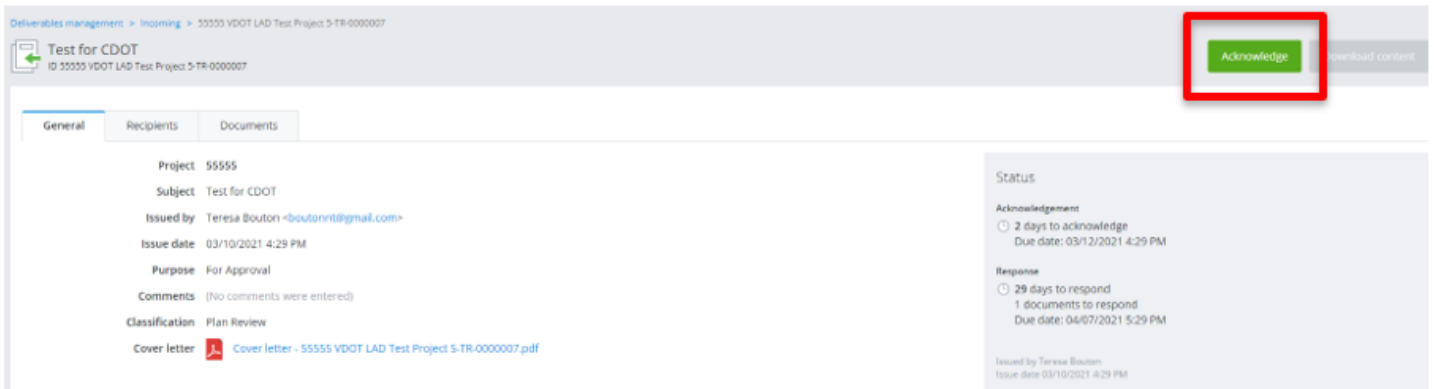
Receiving a Transmittal in the ProjectWise Portal

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. 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.

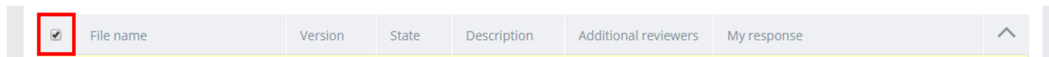
Note: When assigned a role within a transmittal, responses are assigned one of the following states per user:



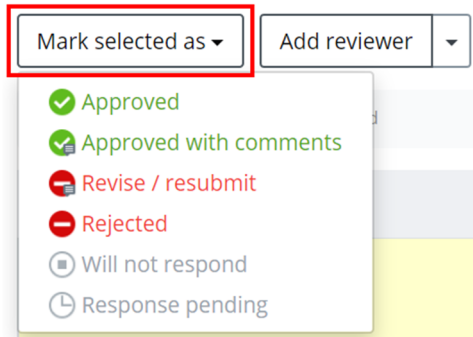
7. Transmittal attachments may be downloaded individually by navigating to the Documents tab or, in bulk, by clicking the “Download content” button at the upper-right of the page:



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.
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.

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.

1. 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.

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

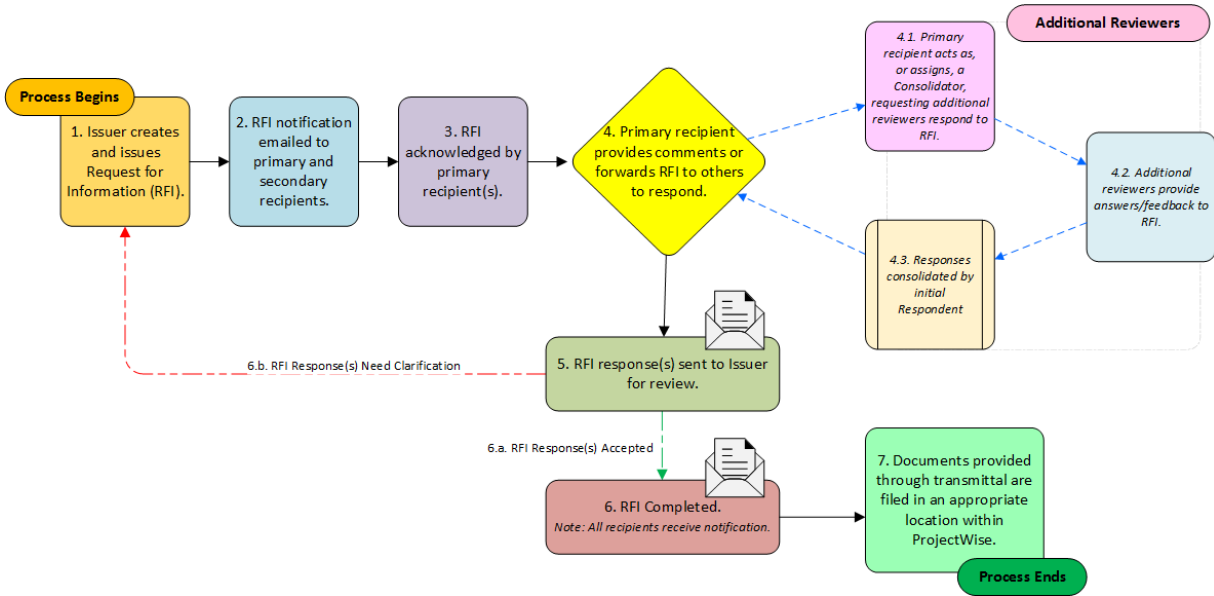
Single response per package from single RFI recipient (cc recipients are kept in the loop but can’t respond)

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

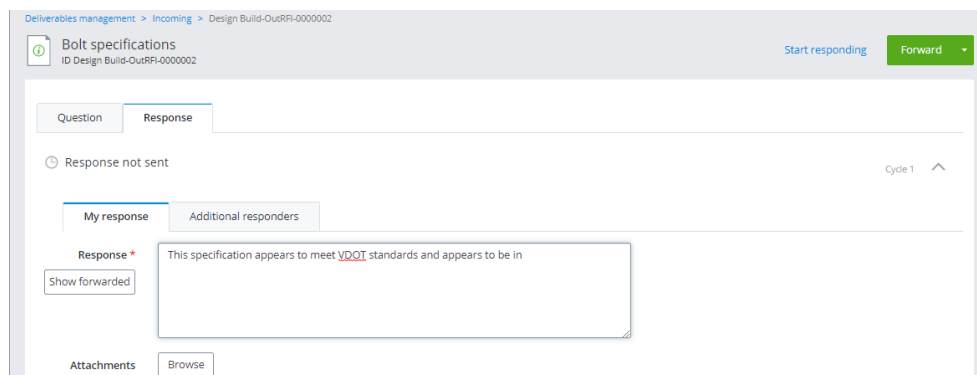
RFI Workflow Diagram



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. When complete, click the “Send response” button at the bottom of the page.

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.

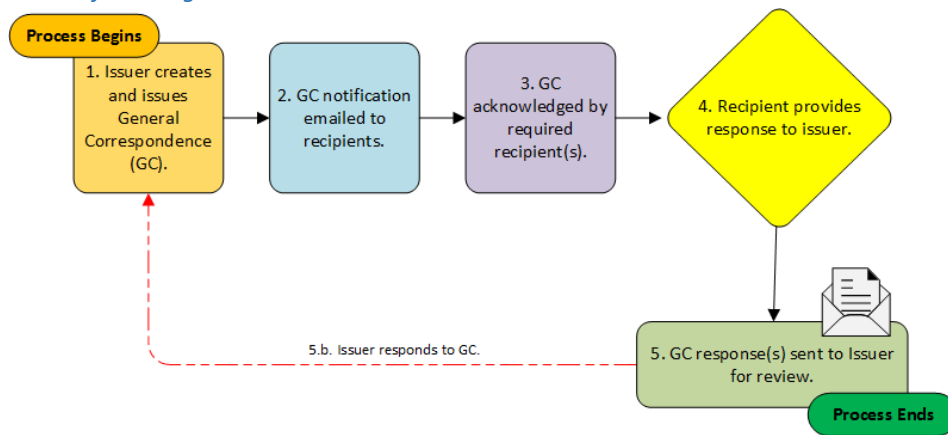
General Correspondence Package - Manage and track all contractual communication using single tool

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



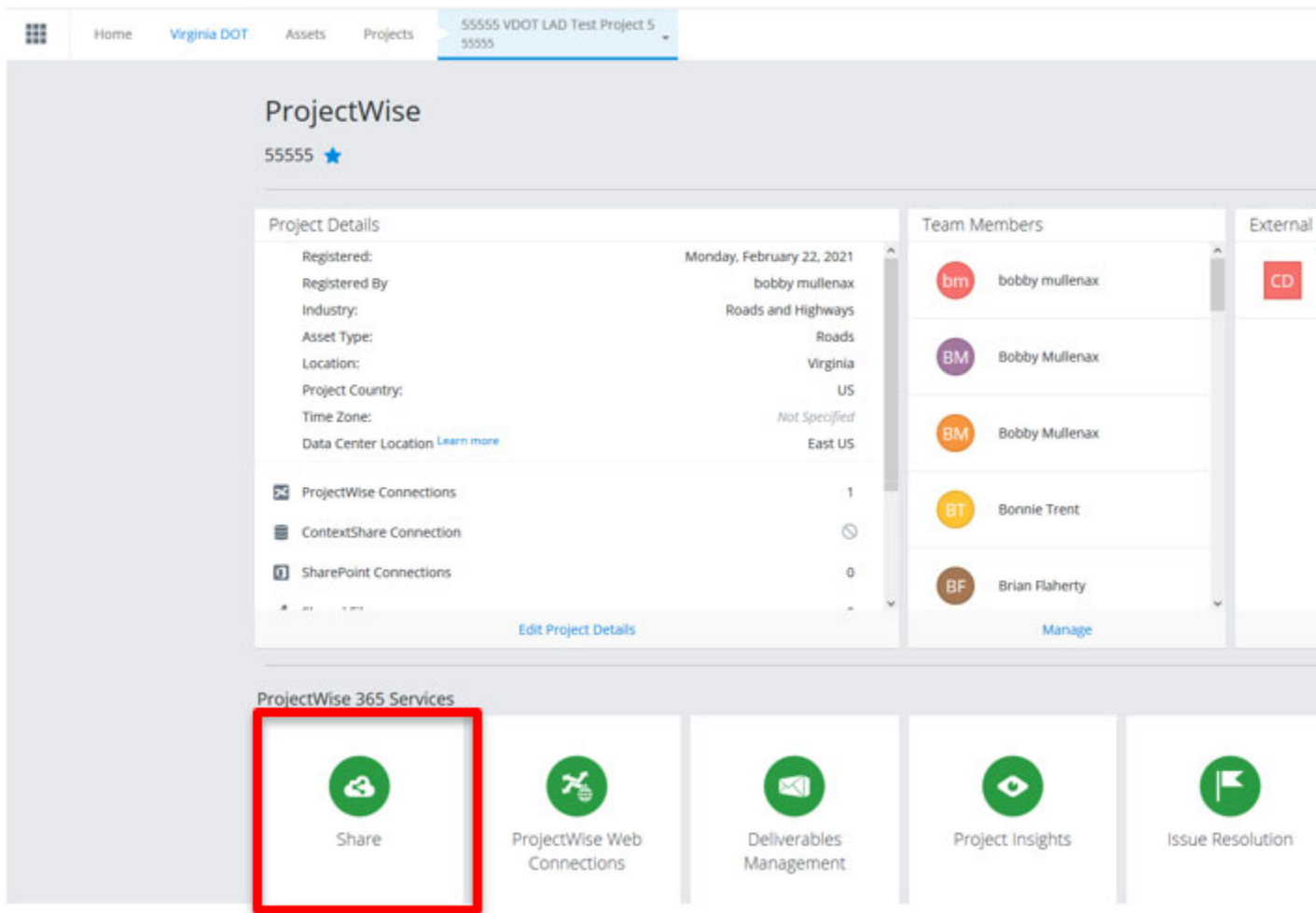
Receiving General Correspondence

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 (much like drop box) 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 access the Share repository, select your Project from the Portal, you will then see the Share tab below, select Share tab to enter

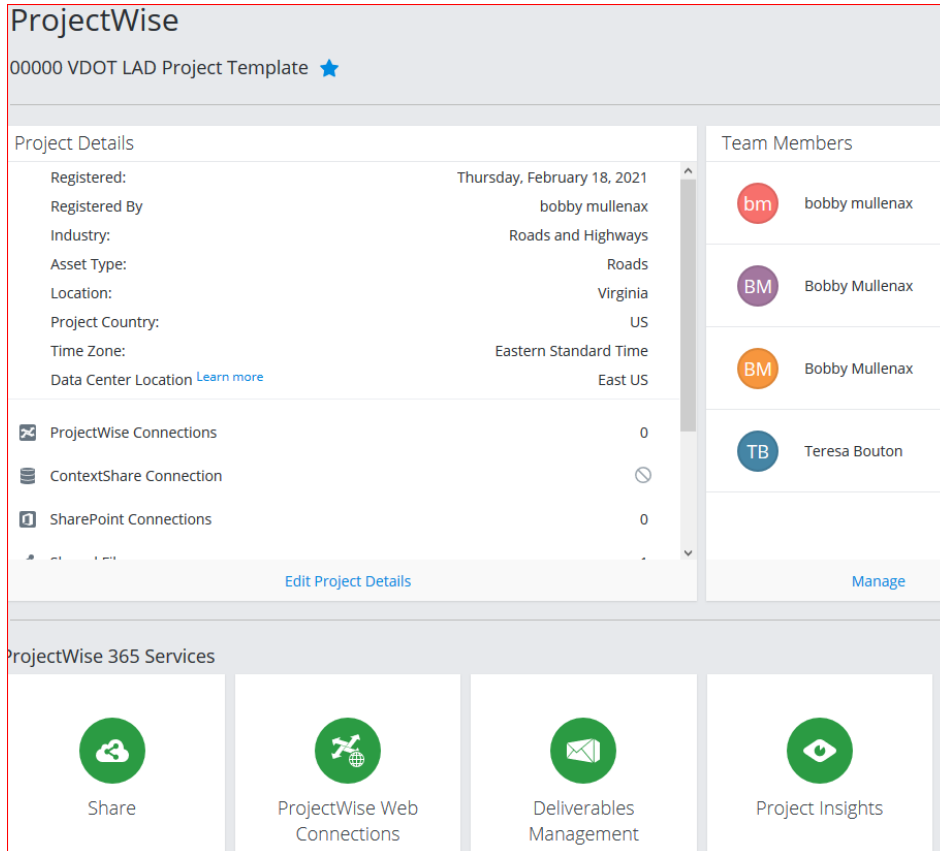


ProjectWise Web Connections

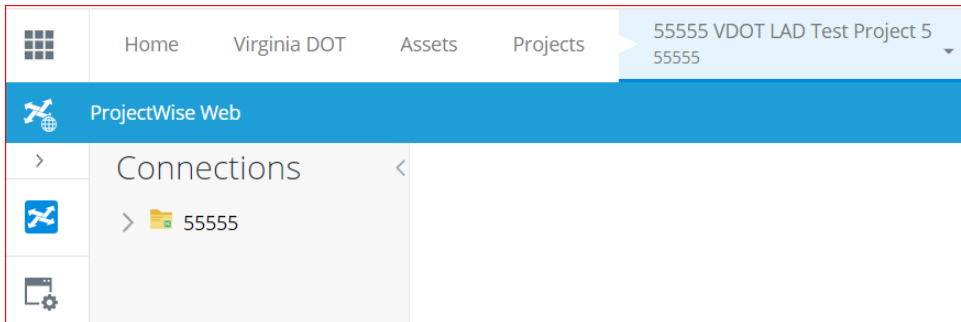
ProjectWise Web Connections provides web access to the VDOT ProjectWise file storage to any user with a valid ProjectWise-enabled network account. Using this service, a user may access files located on physical

VDOT ProjectWise servers. The recommended method is to use ProjectWise Explorer to access the LAP folders under the UPC. However, those folders can be accessed while in the portal.

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:



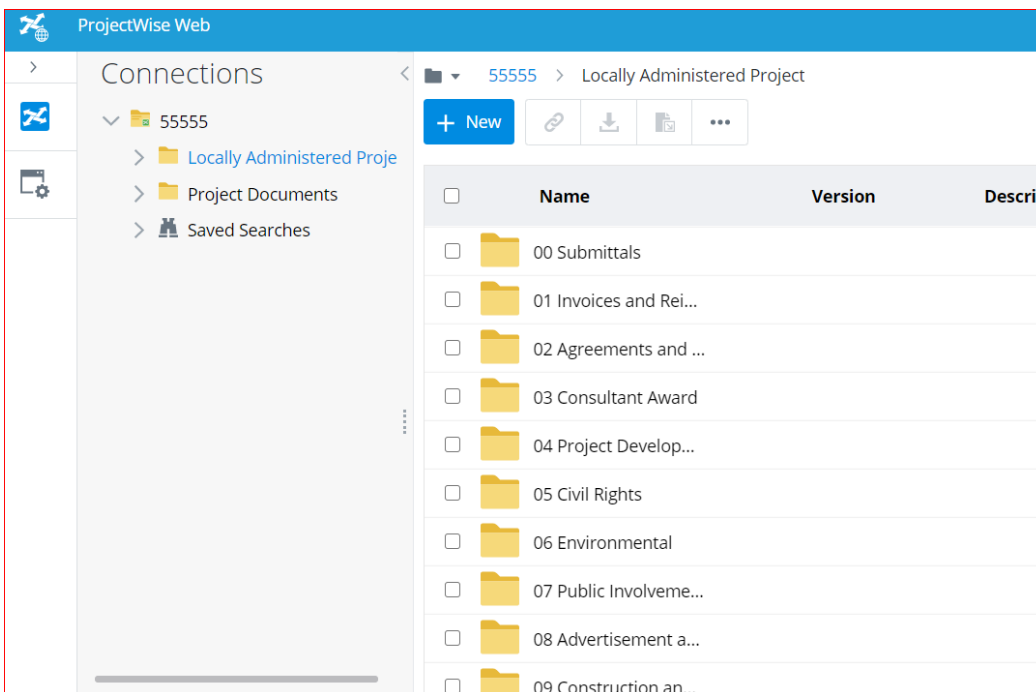
Select the ProjectWise Web Connections and in the following screen, elect the Project number to expand



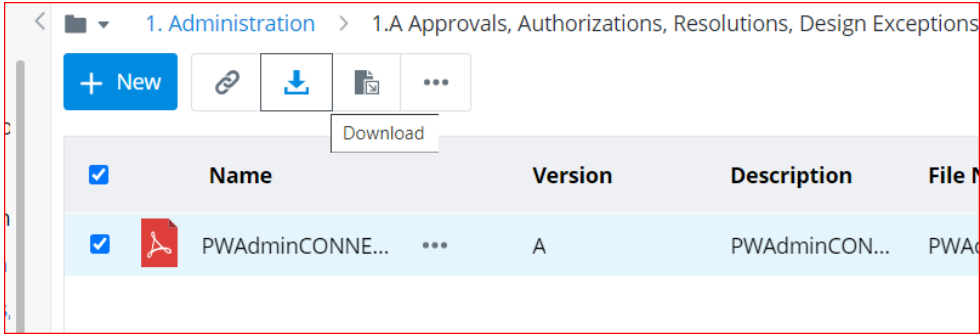
You will be required to enter your username and password

A sign-in form titled 'Sign in' with the instruction 'Enter your ProjectWise credentials for 55555'. It contains two input fields: 'User name' with the value 'tbouton' and 'Password' with masked characters. There is a checkbox for 'Use Bentley IMS authentication' and a blue 'Sign In' button.

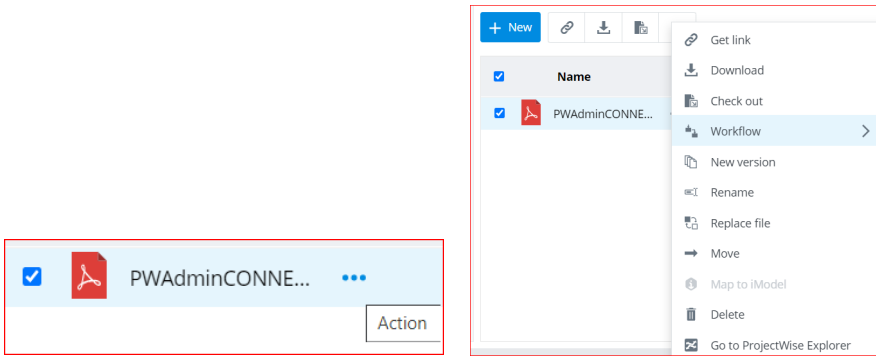
You will now see your ProjectWise folder structure displays just like the ProjectWise Explorer. Your permissions are the same as they are in ProjectWise Explorer.



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



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



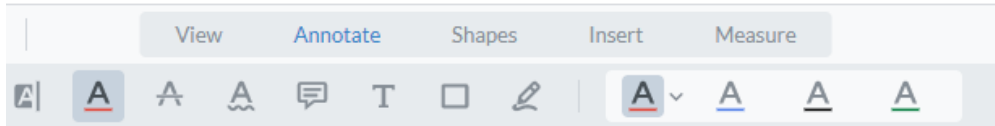
PDF Markup Tool

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:

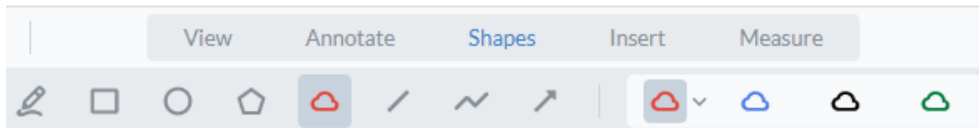
View – Zoom in and out, pan and highlight with selection tool



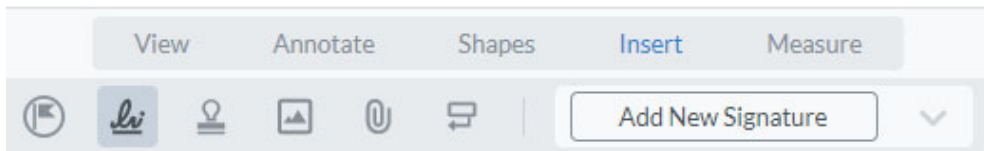
Annotate pdf with highlighting, strike through, underlining, add notes



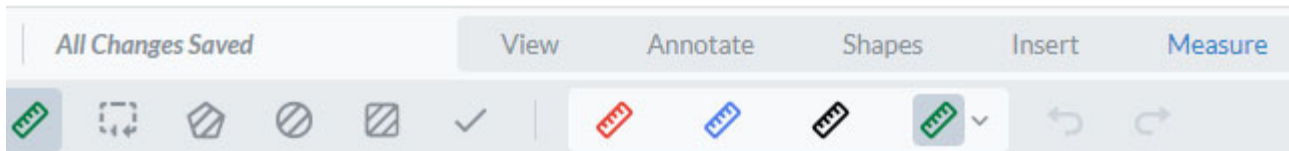
Shapes – Add clouds, shapes and draw freehand elements



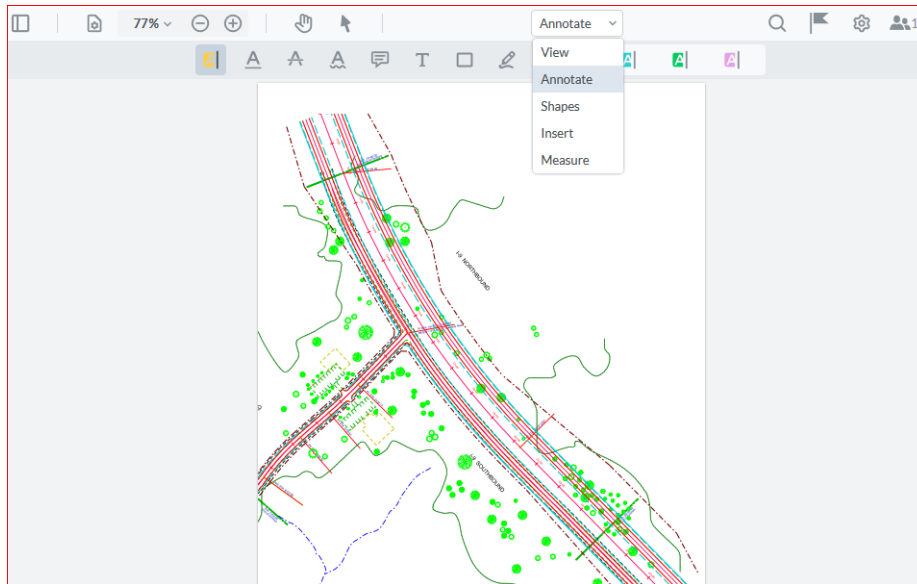
Insert – Add and track an issue, signature, stamp, rubber stamp, insert documents and add callouts



Measure – Distance, area, count and perimeter



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

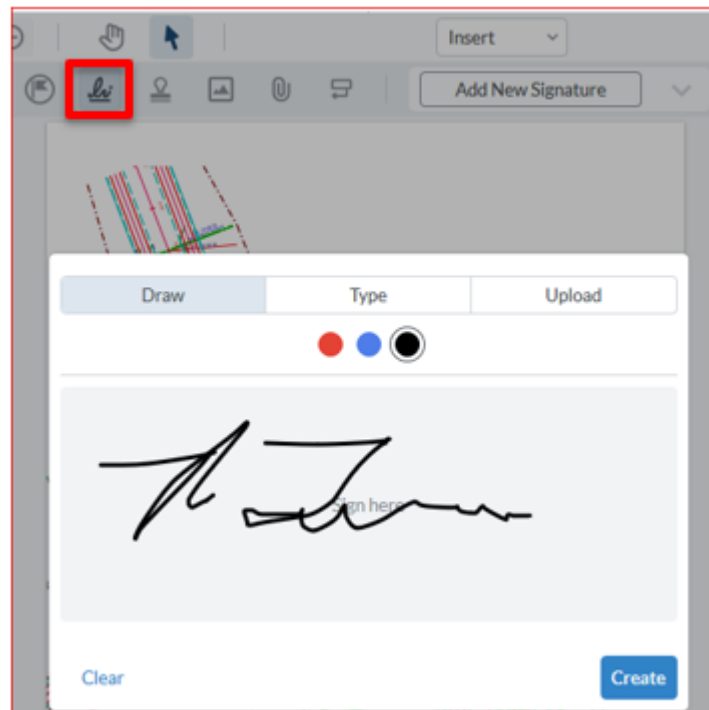


Note: In ProjectWise Web Connections, the PDF markup tool will require a user to log in using his/her COV account credentials.

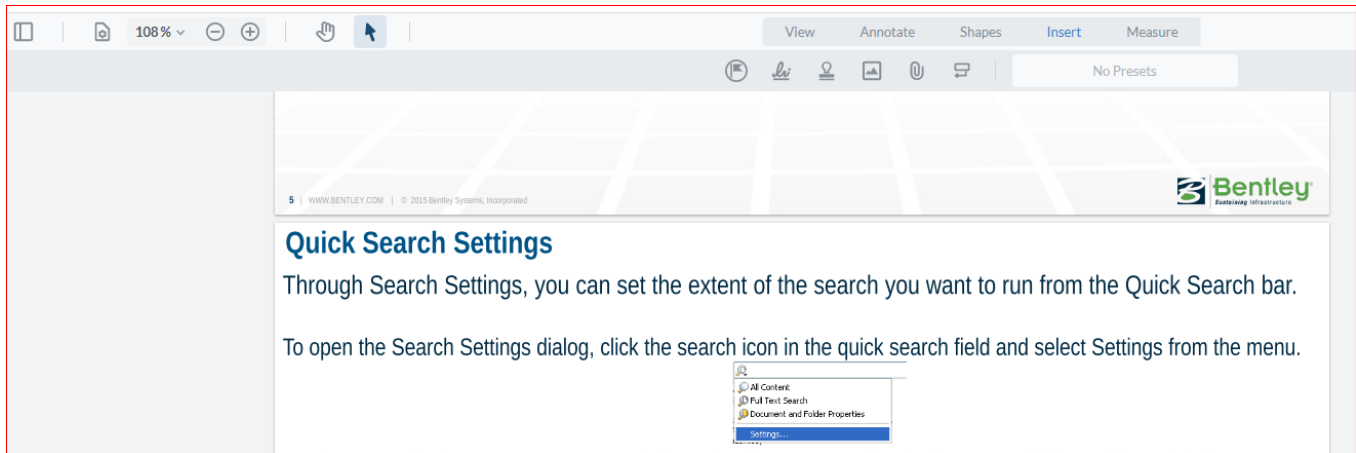
2. When the user has read-only access to a file, the PDF markup tool will display a red padlock signifying that the document is read-only in lieu of providing markup utilities, etc.:



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:



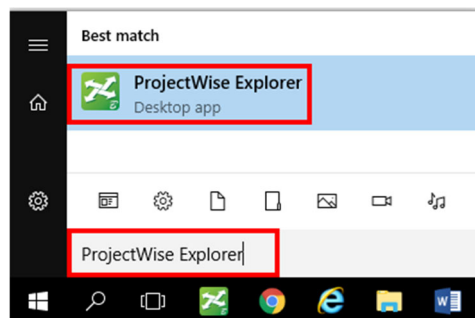
Note: The PDF markup tool does not modify original documents, but adds a transparent overlay, which contains and allows the display of user markup data.

ProjectWise Explorer

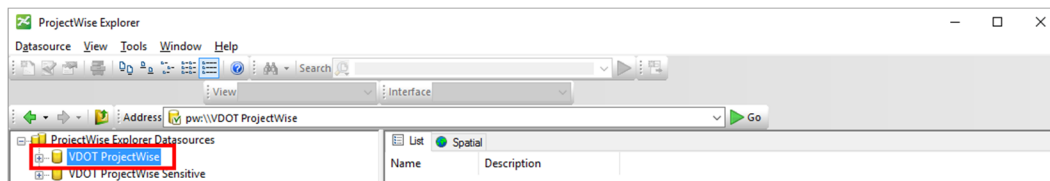
The desktop ProjectWise Explorer client is an extremely useful tool within the ProjectWise suite. It provides many of the same services as the ProjectWise portal online, but with a greater focus on document management. Although it is feasible to receive Transmittals through ProjectWise Explorer, it is **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 and navigating the LAD Folder Structure.

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*:

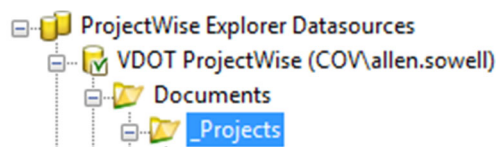


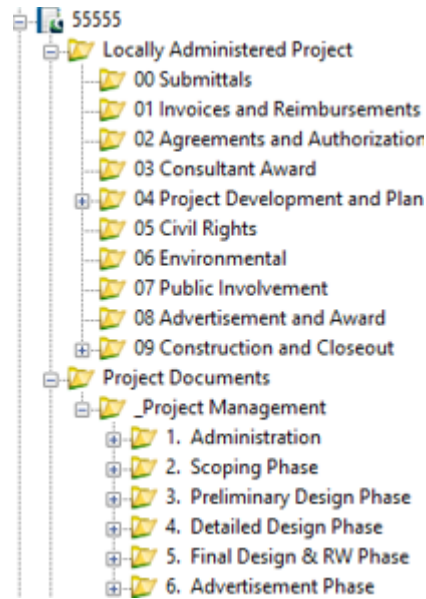
2. The ProjectWise Explorer window will open. Double-click on the appropriate datasource connection in the navigation panel on the left of the ProjectWise Explorer window. By default, VDOT projects are located in the VDOT ProjectWise datasource:



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

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





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

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>

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