



# • ProjectWise Deliverables Management Overview and Best Practices for Administrators

Training Overview

2025

Teresa Bouton  
*Senior Consultant*

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# Presenting today

- **Teresa Bouton**
  - Senior ProjectWise Consultant
  - Central Florida

## **Bentley ProjectWise Deliverables Management Overview and Best Practices**

This session will review some best practices from a Project Administrator Perspective on the setup and use of the Deliverables Management settings through the Project Portal and the Deliverables management Plugin.

# Deliverables Management

## What is it?

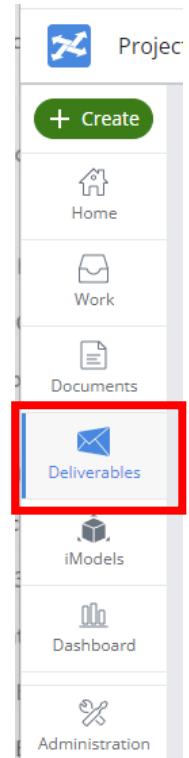
ProjectWise Deliverables Management provides secure deliverables exchange between business entities. It ensures that deliverables package information can be trusted, speeds up preparation process, and makes it easy to identify and resolve urgent issues.

## Key benefits:

- Provides status visibility of all incoming and outgoing deliverables, and RFIs.
- Ensures that only authorized contractors and subcontractors have access to deliverables and RFIs.
- Enables recipients to easily acknowledge, download, review, and respond to the documents through the web portal.
- Makes the deliverables review process easy to track through email notifications and the built-in audit trail.
- Tracking of when deliverables are received, opened and responded

## Where do I Find it?

- <https://connect.bentley.com>,
- <https://projectwise365.bentley.com>, or
- <https://infrastructurecloud.bentley.com>

A screenshot of the Deliverables Management web portal. The interface shows a list of outgoing deliverables. The columns include Subject, Classification, Issued, Purpose, Status, Progress, and Actions. Two entries are visible:

Subject	Classification	Issued	Purpose	Status	Progress	Actions
PDF Markup test ID: 012345-PWInsights-TR-00000... To: Teresa Bouton, Eagle Infrastructure		10/26/2022 3:19 PM	For Approval	<span>Acknowledged</span> Due date: 10/28/2022 3:19 PM <span>Responded</span> Due date: 11/09/2022 2:19 PM	<span>Acknowledged</span> 1 / 1 <span>Responses</span> 1 / 1	<span>Acknowledged</span> 1 / 1 <span>Responses</span> 1 / 1
New Team Member ID: 012345-PWInsights-GC-0000... To: Teresa Bouton, Eagle Infrastructure		10/18/2022 12:50 PM	General Correspondence	<span>Acknowledged</span> Due date: 10/20/2022 12:50 PM <span>Responded</span> Due date: 10/25/2022 12:50 PM	<span>Acknowledged</span> 1 / 1 <span>Responses</span> 1 / 1	<span>Acknowledged</span> 1 / 1 <span>Responses</span> 1 / 1

# Deliverables Management Overview

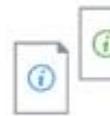
## Package types and when to use them?



### Transmittal/Submittal

#### Used for design deliverables review/approval:

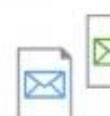
- When you need to review multiple documents and send separate response for each.
- Each document can be responded by multiple reviewers from different orgs
- Ability to review and markup PDF via web browser
- All parallel PDF reviewers (from same org) can see each other comments/issues
- Helps resend new document versions with fixes



### RFI

#### Used for formal Requests For Information (RFI):

- Single response per package from single RFI recipient (cc recipients are kept in the loop but cannot respond)
- No ability to respond per each attached document
- Multiple response cycles supported until response is accepted
- Ability to suggest and finalize impact to help negotiate scope



### General Correspondence

#### Used for all other contractual communication:

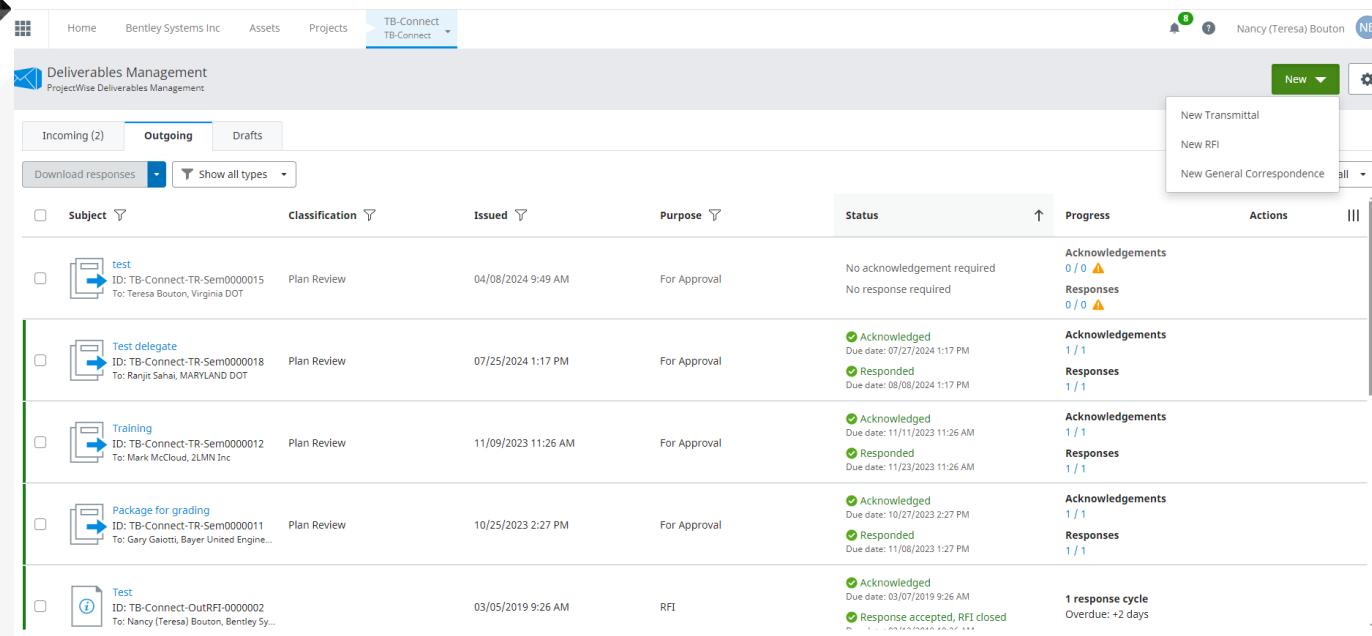
- Manage and track all contractual communication using single tool
- Multiple responders supported per package. CC recipients may also respond
- Threaded view to see multiple related packages and their responses in single page
- Helps track ball-in-court responsibility
- Better than email: Custom form with configurable attributes; Response due dates and reminders; Audit trail

# Deliverables Management Settings in a Transmittal

# Deliverables Management Overview

## Deliverables Management Interface

- a. There are 3 tabs that show the packages, Incoming from clients, Outgoing sent from my team and any drafts for use in new packages
- b. Also add Recipients if a distribution matrix is not used Documents and scheduling as needed
- c. Any documents that will be sent will be added in the documents tab
- d. Scheduling tab lets you set due dates for responses
- e. Responses tab is where you will review the responses to your RFI, Submittal/Transmittal



The screenshot shows the Bentley ProjectWise Deliverables Management interface. The top navigation bar includes Home, Bentley Systems Inc, Assets, Projects, TB-Connect, and a user profile for Nancy (Teresa) Bouton. The main title is 'Deliverables Management' with a subtitle 'ProjectWise Deliverables Management'. Below the title, there are three tabs: 'Incoming (2)', 'Outgoing', and 'Drafts'. The 'Outgoing' tab is selected. A sub-menu on the right shows 'New Transmittal', 'New RFI', and 'New General Correspondence'. The main content area displays a table of packages. The columns are: Subject, Classification, Issued, Purpose, Status, Progress, and Actions. The table contains five rows of data:

Subject	Classification	Issued	Purpose	Status	Progress	Actions
test ID: TB-Connect-TR-Sem0000015 To: Teresa Bouton, Virginia DOT	Plan Review	04/08/2024 9:49 AM	For Approval	No acknowledgement required No response required	Acknowledgements 0/0 ▲ Responses 0/0 ▲	
Test delegate ID: TB-Connect-TR-Sem0000018 To: Ranjit Sahai, MARYLAND DOT	Plan Review	07/25/2024 1:17 PM	For Approval	<span style="color: green;">Acknowledged</span> Due date: 07/27/2024 1:17 PM <span style="color: green;">Responded</span> Due date: 08/08/2024 1:17 PM	Acknowledgements 1/1 Responses 1/1	
Training ID: TB-Connect-TR-Sem0000012 To: Mark McCloud, 2LMN Inc	Plan Review	11/09/2023 11:26 AM	For Approval	<span style="color: green;">Acknowledged</span> Due date: 11/11/2023 11:26 AM <span style="color: green;">Responded</span> Due date: 11/23/2023 11:26 AM	Acknowledgements 1/1 Responses 1/1	
Package for grading ID: TB-Connect-TR-Sem0000011 To: Gary Gaiotti, Bayer United Engine...	Plan Review	10/25/2023 2:27 PM	For Approval	<span style="color: green;">Acknowledged</span> Due date: 10/27/2023 2:27 PM <span style="color: green;">Responded</span> Due date: 11/08/2023 1:27 PM	Acknowledgements 1/1 Responses 1/1	
Test ID: TB-Connect-OutRFI-0000002 To: Nancy (Teresa) Bouton, Bentley Sy...	RFI	03/05/2019 9:26 AM		<span style="color: green;">Acknowledged</span> Due date: 03/07/2019 9:26 AM <span style="color: green;">Response accepted, RFI closed</span>	1 response cycle Overdue: +2 days	

# Deliverables Management Overview

## Deliverables Management Transmittal Creation

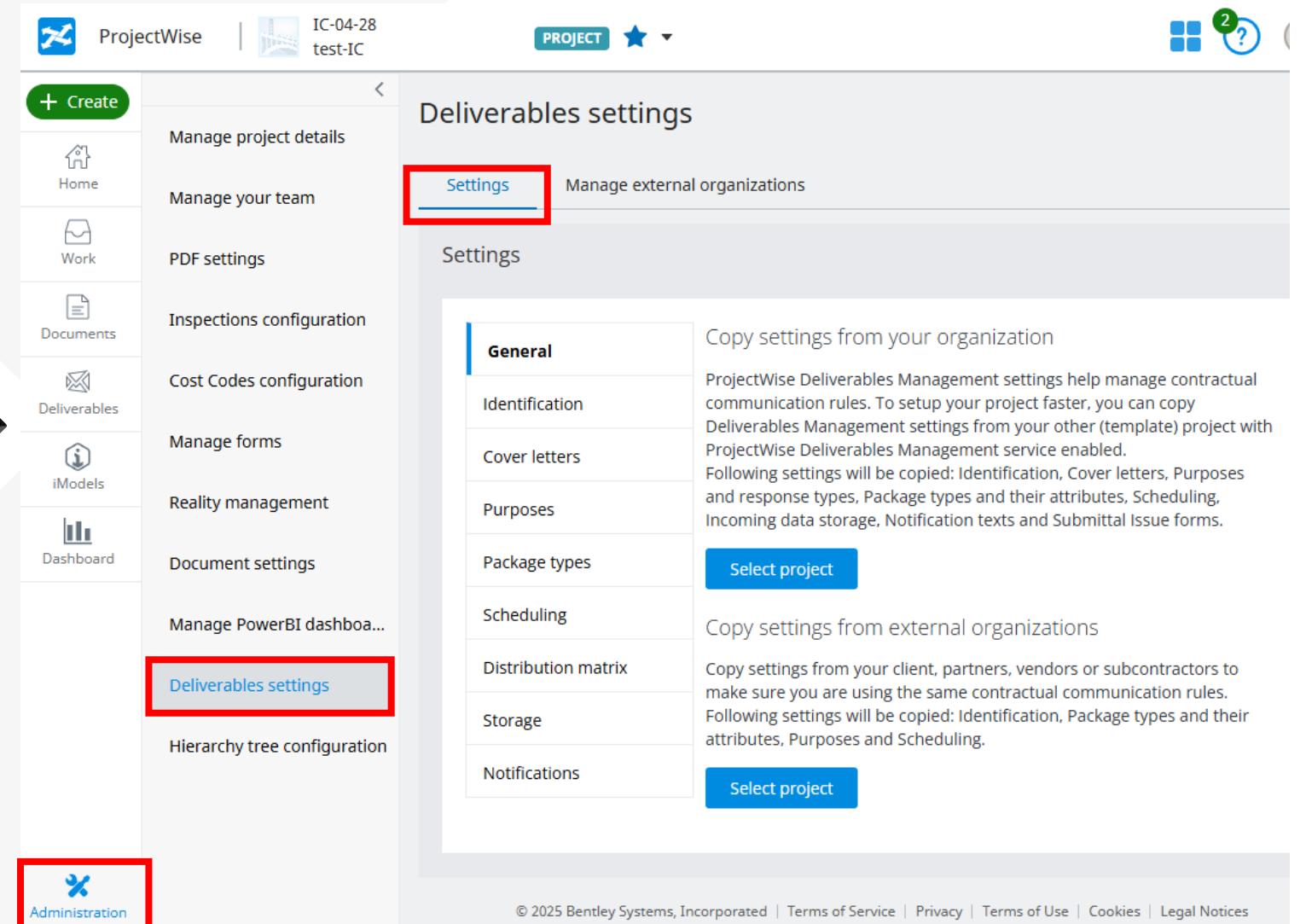
- a. In the General tab you may add an approved Distribution list, add the Subject, Purpose, and Classification for your project
- b. Also add Recipients if a distribution matrix is not used Documents and scheduling as needed
- c. Any documents that will be sent will be added in the documents tab
- d. Scheduling tab lets you set due dates for responses
- e. Responses tab is where you will review the responses to your RFI, Submittal/Transmittal

## Deliverables Management Transmittal Creation

The image shows a screenshot of a software application for 'Deliverables Management Transmittal Creation'. The interface is divided into several tabs: General, Recipients, Documents, Scheduling, and Responses. The General tab is currently active, showing fields for Project (55555), Subject (a text input field), Purpose (a dropdown menu set to 'For Review'), a checkbox for 'Confidential data included' (unchecked), Distribution rule (a dropdown menu set to 'Review - Change Order'), Comments (a large text area), and Classification (a dropdown menu set to 'Scope Change Validation'). The Recipients tab is the second tab from the left, featuring an 'Add...' button, a 'Remove' button, and a search icon. Below these are columns for 'Recipient' (with a checkbox and email input), 'Ack' (with a checked checkbox), 'Resp' (with a checked checkbox), 'Comments' (a text input field), and 'Company' (a text input field). A single recipient entry is shown: 'Nancy (Teresa) Bouton' with the email 'teresa.bouton@bentley.com'. The Ack and Resp checkboxes are checked. The Bentley Systems Inc PW-Insights training logo is visible in the bottom right corner.

# Deliverables Management Settings

Access  
Deliverables  
Management  
Settings



ProjectWise | IC-04-28 test-IC | PROJECT | 2 ?

**Deliverables settings**

**Settings** Manage external organizations

**General** Copy settings from your organization

- Identification
- Cover letters
- Purposes
- Package types
- Scheduling
- Distribution matrix
- Storage
- Notifications

**Select project**

**Copy settings from external organizations**

ProjectWise Deliverables Management settings help manage contractual communication rules. To setup your project faster, you can copy Deliverables Management settings from your other (template) project with ProjectWise Deliverables Management service enabled. Following settings will be copied: Identification, Cover letters, Purposes and response types, Package types and their attributes, Scheduling, Incoming data storage, Notification texts and Submittal Issue forms.

**Deliverables settings** Manage PowerBI dashboard

**Hierarchy tree configuration**

**Administration**

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# Deliverables Management Settings

## Deliverables Management Settings – General

### General Settings Tab

In the General tab you are able to copy settings from other Internal and External projects

#### General

Identification

Cover letters

Purposes

Package types

Scheduling

Distribution matrix

Storage

Copy settings from your organization

ProjectWise Deliverables Management settings help manage contractual communication rules. To setup your project faster, you can copy Deliverables Management settings from your other (template) project with ProjectWise Deliverables Management service enabled.

Following settings will be copied: Identification, Cover letters, Purposes and response types, Package types and their attributes, Scheduling, Incoming data storage, Notification texts and Submittal Issue forms.

Select project

Copy settings from external organizations

Copy settings from your client, partners, vendors or subcontractors to make sure you are using the same contractual communication rules.

Following settings will be copied: Identification, Package types and their attributes, Purposes and Scheduling.

Select project

# Deliverables Management Settings

## Deliverables Management Settings – Identification

### Identification Settings Tab

Define classifying labels for transmittals, submittals and RFIs. Select the check in the Prefix column to edit numbering of the Package Types, Choose the pencil to edit the Classification

Identification

Numbering Classification

Numbering rules are used to generate your packages' IDs. Each ID consists of fixed prefix and autoincremental number. These rules will be applied to all the packages sent or received within current project.

Package type	Prefix	Preview
Transmittal	{ProjectID}-TR-	012345-PWInsights-TR-0000001
Outgoing RFI	{ProjectID}-OutRFI-	012345-PWInsights-OutRFI-0000001
General Correspondence	{ProjectID}-GC-	012345-PWInsights-GC-0000001

Classification

Define classifying labels for transmittals, submittals and RFIs to indicate Classification will appear in the appropriate lists as additional filtering option.

Make Classification attribute required when creating a package (users)

Classifying label

PS & E

Scoping

C-25 Source of Materials

Change Order

CN Invoice and Reimbursement

Construction Federal Authorization

Design Waiver-Exception

Start C-5

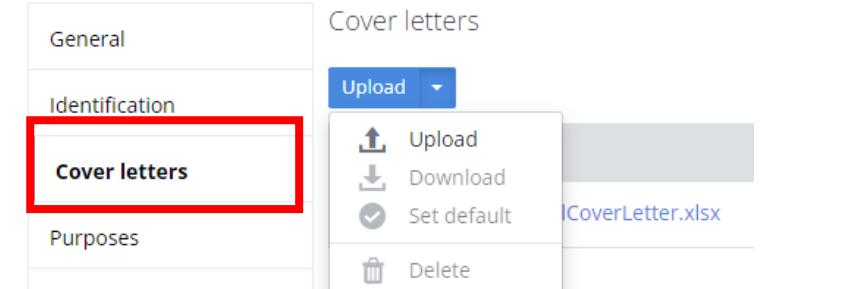
Ending LAP C-5

# Deliverables Management Settings

## Cover Letter Settings Tab

You may download your cover letter and edit. Once you have it to your liking, upload it and set as default. This will be the default Cover Letter for all correspondence

## Deliverables Management Settings – Cover Letters



 Transmittal cover letter

**TRANSMITTAL DETAILS**

Project:	{\$Project.Name\$}
Project number:	{\$Project.Number\$}
Transmittal ID:	{\$Transmittal.Code\$}
Subject:	{\$Transmittal.Subject\$}
Purpose:	{\$Transmittal.Purpose\$}
Classification:	{\$Transmittal.Classification\$}
Issue date:	{\$Transmittal.CurrentDate\$}
Acknowledge due date:	{\$Transmittal.AcknowledgeDueDate(yyyy MMMM dd h:mm tt "}{\$Transmittal.ResponseDueDate(yyyy MMMM dd h:mm tt ")(UTI)}
Response due date:	

**COMMENTS**  
{\$Transmittal.Comment\$}

**RECIPIENTS**

Recipient name	Response required	Comments	Company	Recipient title	Email
{\$Recipient.Name\$}	{\$Recipient.Respon	{\$Recipient.Comments\$}	{\$Recipient.Company\$}	{\$Recipient.Title\$}	{\$Recipient.e-mail\$}

**DOCUMENTS**

Item no.	File name	Version	State	Description	File path
{\$Formul	{\$Document.FileName\$}	{\$DocumentAttri	{\$DocumentAttribute.Get	{\$DocumentAttribute.GetValue(Description	{\$Document.Path\$}

**REFERENCES**

Item no.	File name	Version	State	Reference Of	File path
{\$Formul	{\$Reference.FileName\$}	{\$ReferenceAttrib	{\$ReferenceAttribute.Get	{\$Reference.ReferenceOf\$}	{\$Reference.Path\$}

# Deliverables Management Settings – Purposes

## Deliverables Management Settings

**Purposes** - Each transmittal you create requires that you assign a *purpose* to the transmittal. The purpose controls:

- which reply actions are turned on or off by default for each participant that is manually added as a recipient to the transmittal draft
- which response options the recipients can choose from, if they are required to respond
- whether or not the confidential setting is turned on or off by default in the transmittal
- which related distribution rules you can apply to the transmittal, if distribution rules are configured for this project

Each project contains a set of default purposes. You can edit the name or settings for any of the default purposes, add new purposes, change the order in which they appear in the Transmittal Draft dialog, or delete any purposes you do not need.

Settings

General	Purposes				
Identification	<a href="#">New purpose</a> ▾				
Cover letters	<input type="checkbox"/> Purpose	Acknowledge	Response	Confidential	Response types
Purposes	<input type="checkbox"/> For Review	✓	✓		Approved; Approved with comments; Rejected; Revise / resubmit; Will not respond
Package types	<input type="checkbox"/> For Approval	✓	✓		Approved; Rejected; Will not respond
Scheduling	<input type="checkbox"/> For Information	✓	Not expected		N/A
Distribution matrix	<input type="checkbox"/> For Construction	✓	Not expected		N/A
Storage	<input type="checkbox"/> For Design	✓	Not expected		N/A
Notifications	<input type="checkbox"/> For Estimation	✓	Not expected		N/A
	<input type="checkbox"/> test	✓	✓		Approved; Rejected; Will not respond; Fix at 70%

# Deliverables Management Settings

**Package Types** – These can be edited by adding attributes. This will add additional columns in the Documents section of a Transmittal by selecting New attribute from the pull down menu, change the order in which they are displayed by selecting the up and down arrow next to New attribute

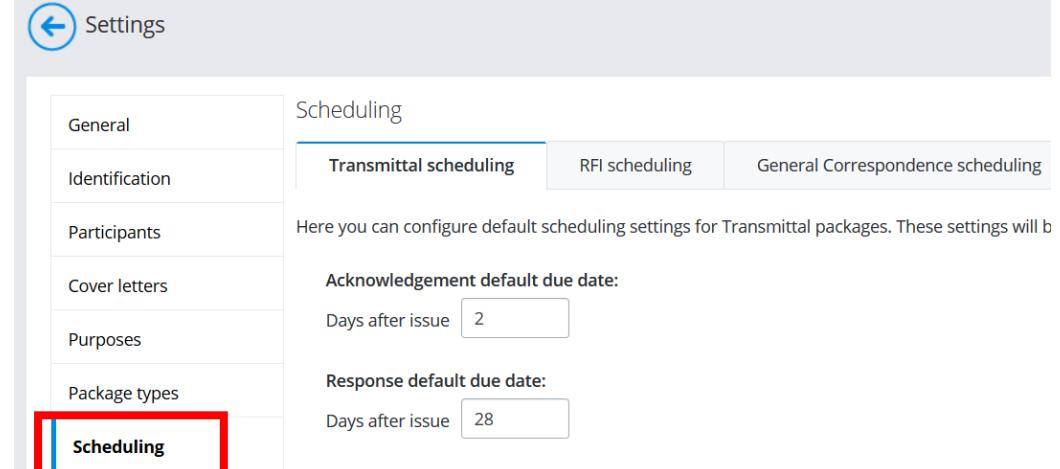
## Deliverables Management Settings – Package Types

The image shows two screenshots of Bentley ProjectWise software. The top screenshot is titled 'Package types' and shows a configuration interface for 'Transmittal' documents. It includes sections for 'Identification', 'Participants', 'Cover letters', and 'Scheduling'. A 'Participants' section is highlighted with a red box. The 'Package types' section is also highlighted with a red box. A dropdown menu is open over the 'Package types' section, with 'New attribute' selected. Below the menu are buttons for '+ New attribute', 'Edit', and 'Delete'. The bottom screenshot shows a 'Transmittal draft' interface with tabs for 'General', 'Recipients', 'Documents', 'Scheduling', and 'Responses'. The 'Documents' tab is selected. It shows a list of 'Documents 1 document(s)'. The first document is 'Email templates.docx', which is highlighted with a red box. The table columns for this document are 'File name', 'Version', 'State', and 'Description'.

# Deliverables Management Settings

**Scheduling** – You can configure default scheduling settings for Transmittal, RFI's and General Correspondence here

## Deliverables Management Settings – Scheduling



Settings

Scheduling

Transmittal scheduling      RFI scheduling      General Correspondence scheduling

General      Identification      Participants      Cover letters      Purposes      Package types      Scheduling

Acknowledgement default due date:  
Days after issue

Response default due date:  
Days after issue

# Deliverables Management Settings

**Distribution matrix** - Document distribution matrix for transmittals allows defining what project documents should be sent for information, review or approval to specified recipients. In a new Project by default there is no Matrix set for the Project. You may upload one.

## Deliverables Management Settings – Distribution Matrix

Active matrix for transmittals

*i* There is no Document distribution matrix set for this project.  
Click Upload to associate new Document distribution matrix for this project.

[Upload new](#)

---

History

General	Document distribution matrix
Identification	Document distribution matrix for transmittals allows defining what project documents should be sent for information, review or approval to specified recipients. This might help speed up transmittal package creation and/or enable creating a transmittal package that is approved by specific users.
Participants	
Cover letters	
Purposes	
Package types	
Scheduling	
<a href="#">Distribution matrix</a>	

Active matrix for transmittals

[Upload new](#) [Upload new](#) [Validate](#) [distributionMatrix\\_LAD\\_Template - Overall.xlsx](#)  
[Remove](#)

1 / mellenax  
2024-11-20 12:02 PM

# Deliverables Management Settings

**Distribution matrix** – You are able to Download the Distribution Matrix Template. It will automatically fill in what you have set in the previous settings. You can modify those settings and users as needed. Please refer to the Tutorial Tab for guidance. Please do not make changes in the Validationdata tab, it is created by the system and should not be modified.

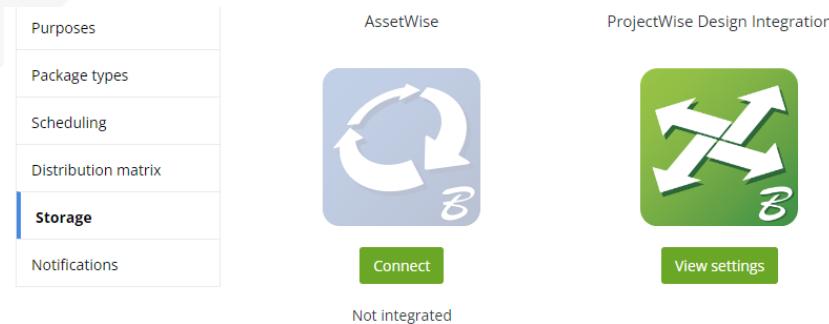
## Deliverables Management Settings – Distribution Matrix

A	B	C	D	E	F	G	H	I	J	K	L	M	N
\$purpose	\$name	\$ResponsePeriod	\$attribute	\$attribute	\$attribute	\$attribute	\$recipient	\$recipient	\$recipient	\$recipient	\$recipient	\$recipient	\$comment
Package Purpose	Name	Max Response Period (calendar days)	File name	Version	State	Description	Role1	Role2	Role3	Role4	Role5	Role6	Comment
For Review	For Review-DocType1	14				IA		I	R+"some text comment"	IA	I	I	DocType1
For Review	For Review-DocType2	14				R	IA		IA	I	I	I	DocType2
For Approval	For Approval-DocType3	14				I		R	IA	I	IA	IA	DocType3
For Approval	For Approval-DocType4	14				I	IA	R	I	IA	I	I	DocType4
For Information	For Information-DocType5	14				I		I		IA+"some text comment"	IA	DocType5	
For Information	For Information-DocType6	14				I		IA		IA	I	I	DocType6
For Construction	For Construction-DocType7	14				I		IA	IA	IA	I	I	DocType7
For Construction	For Construction-DocType8	14				I		IA	IA	I	I	I	DocType8
For Design	For Design-DocType9	14				IA		I	IA	I	I	I	DocType9
For Design	For Design-DocType10	14				IA		I	IA		I	I	DocType10
For Estimation	For Estimation-DocType11	14				I+"some text comment"	IA			I	IA	IA	DocType11
For Estimation	For Estimation-DocType12	14				I		I		IA	IA	IA	DocType12
test	test-DocType13	14				IA	I	IA		R	I	I	DocType13
test	test-DocType14	14				R	IA		IA	I	I	I	DocType14

# Deliverables Management Settings

**Storage**— If you have installed the ProjectWise Deliverables Management connector for ProjectWise Explorer, selecting View settings under the ProjectWise Design Integration icon will Show you what settings are current in ProjectWise Explorer for this Project. To change these settings let's view them in ProjectWise Explorer

## Deliverables Management Settings – Storage



### Organize incoming data folders

To change storage settings, go to the ProjectWise Deliverables Management settings dialog in ProjectWise Explorer client.

#### Transmittal responses

`pw:\ps-na-pw.bentley.com:ps-na-pw-35\Documents\Projects\Attribute-exchange\Transmittal responses\`

#### Confidential transmittal responses

`pw:\ps-na-pw.bentley.com:ps-na-pw-35\Documents\Projects\Attribute-exchange\Confidential\`

#### Submittal documents

`pw:\ps-na-pw.bentley.com:ps-na-pw-35\Documents\Projects\Attribute-exchange\Submittal documents\`

#### Confidential submittal documents

-

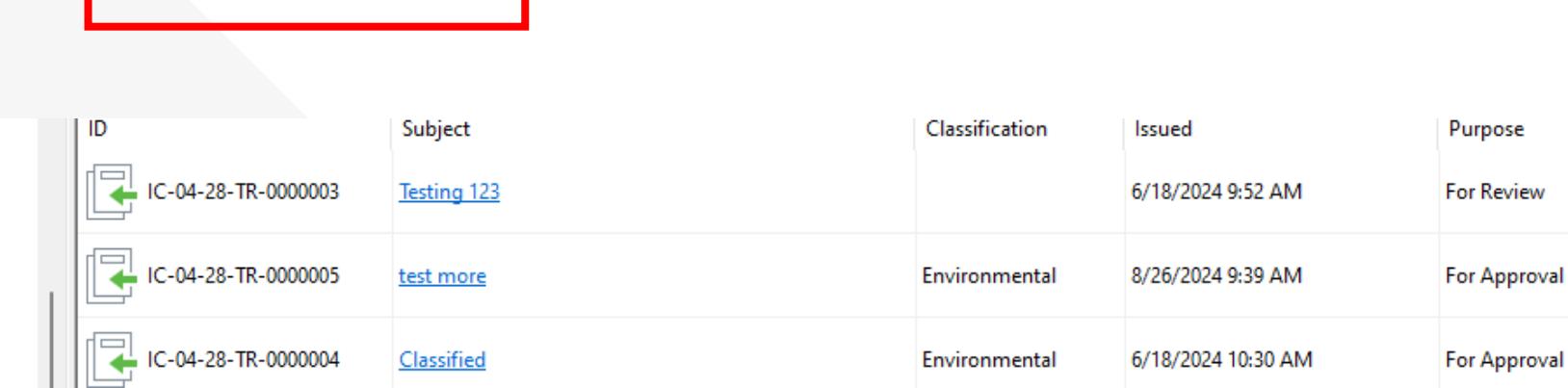
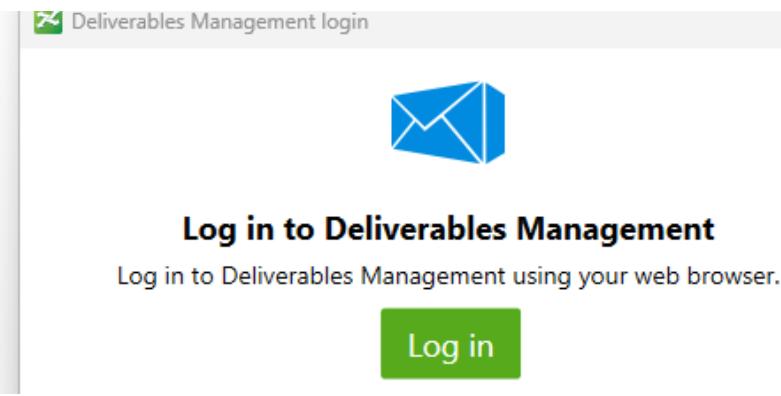
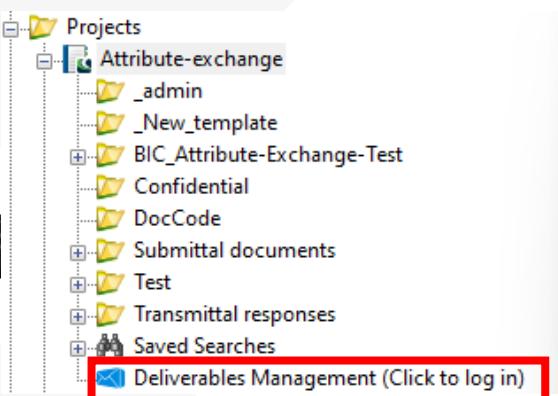
#### Outgoing RFI responses

`pw:\ps-na-pw.bentley.com:ps-na-pw-35\Documents\Projects\Attribute-exchange\Outgoing RFI responses\`

# Deliverables Management Settings

**Deliverables Management**— Selecting the node will ask for login, once you log in you have access to your deliverables from the Portal and settings for use in the Explorer. You will be able to open your Transmittals, RFI's etc. and Download the files into ProjectWise.

## Deliverables Management Settings – Storage



**Log in to Deliverables Management**  
Log in to Deliverables Management using your web browser.

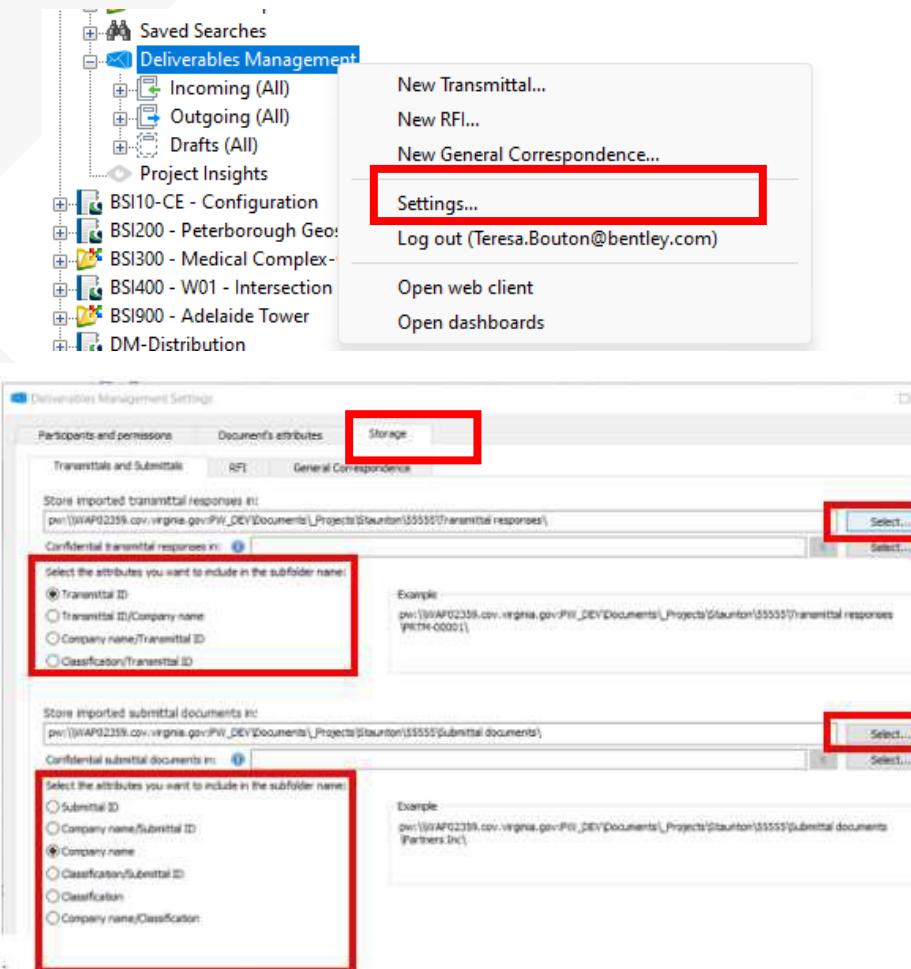
**Log in**

ID	Subject	Classification	Issued	Purpose
IC-04-28-TR-000003	<a href="#">Testing 123</a>		6/18/2024 9:52 AM	For Review
IC-04-28-TR-000005	<a href="#">test more</a>	Environmental	8/26/2024 9:39 AM	For Approval
IC-04-28-TR-000004	<a href="#">Classified</a>	Environmental	6/18/2024 10:30 AM	For Approval

# Deliverables Management Settings

**Storage**— Selecting the + next to the node expands the Deliverables interface, it matches what you see in the portal. Right click on the node to expose Settings where you can choose where to save the files and how to name and categorize them according to selections made in the Portal settings

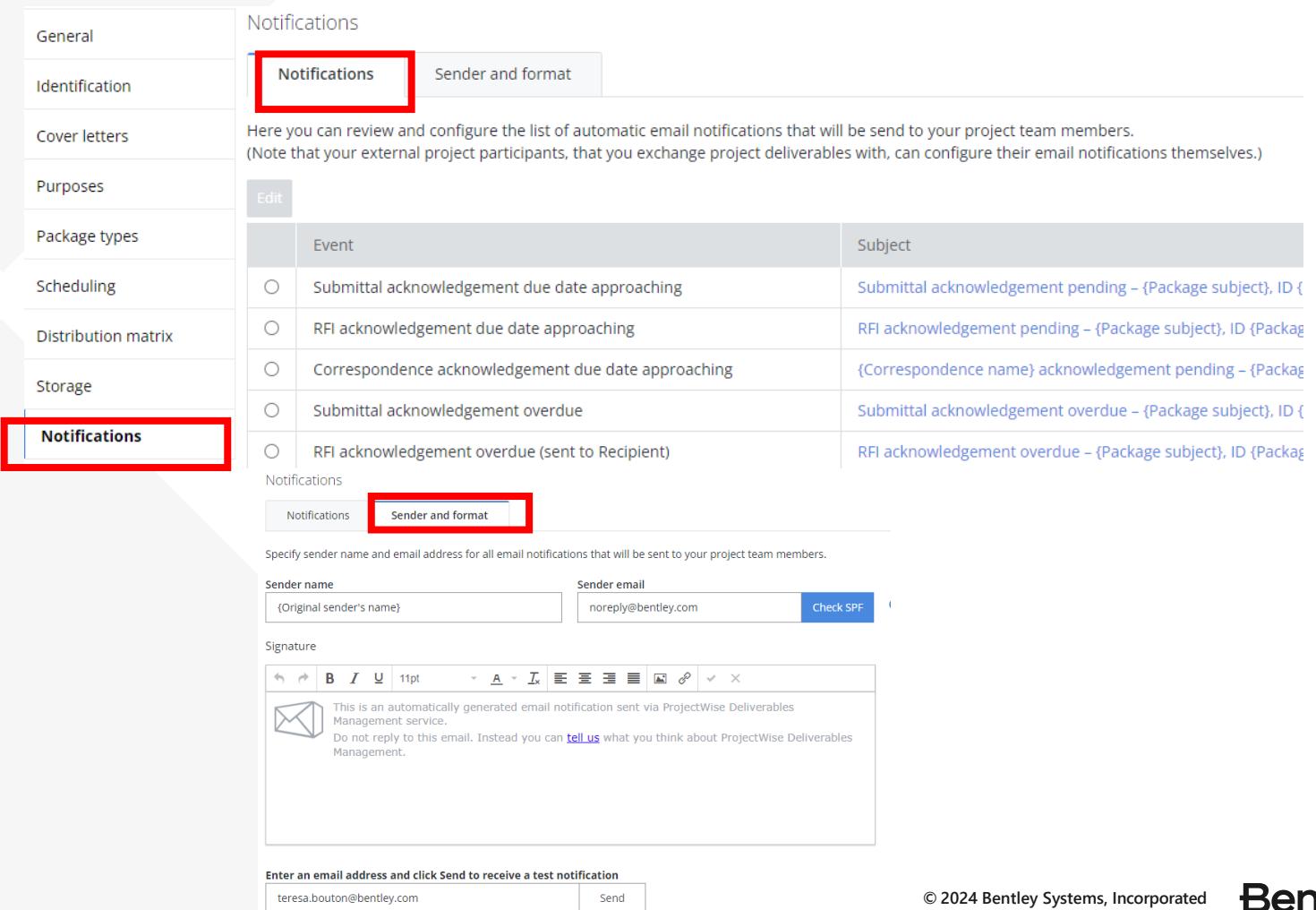
## Deliverables Management Settings – Storage



# Deliverables Management Settings

## Deliverables Management Settings – Notifications

**Notifications**— Here you can review and configure the list of automatic email notifications that will be sent to your project team members. (Note that your external project participants, that you exchange project deliverables with, can configure their email notifications themselves.)



General

Identification

Cover letters

Purposes

Package types

Scheduling

Distribution matrix

Storage

**Notifications**

**Notifications** **Sender and format**

Here you can review and configure the list of automatic email notifications that will be sent to your project team members. (Note that your external project participants, that you exchange project deliverables with, can configure their email notifications themselves.)

**Edit**

Event	Subject
<input type="radio"/> Submittal acknowledgement due date approaching	Submittal acknowledgement pending – {Package subject}, ID {
<input type="radio"/> RFI acknowledgement due date approaching	RFI acknowledgement pending – {Package subject}, ID {Packag
<input type="radio"/> Correspondence acknowledgement due date approaching	{Correspondence name} acknowledgement pending – {Packag
<input type="radio"/> Submittal acknowledgement overdue	Submittal acknowledgement overdue – {Package subject}, ID {
<input type="radio"/> RFI acknowledgement overdue (sent to Recipient)	RFI acknowledgement overdue – {Package subject}, ID {Packag

Notifications

**Notifications** **Sender and format**

Specify sender name and email address for all email notifications that will be sent to your project team members.

Sender name: {Original sender's name} Sender email: noreply@bentley.com Check SPF

Signature

This is an automatically generated email notification sent via ProjectWise Deliverables Management service.  
Do not reply to this email. Instead you can [tell us](#) what you think about ProjectWise Deliverables Management.

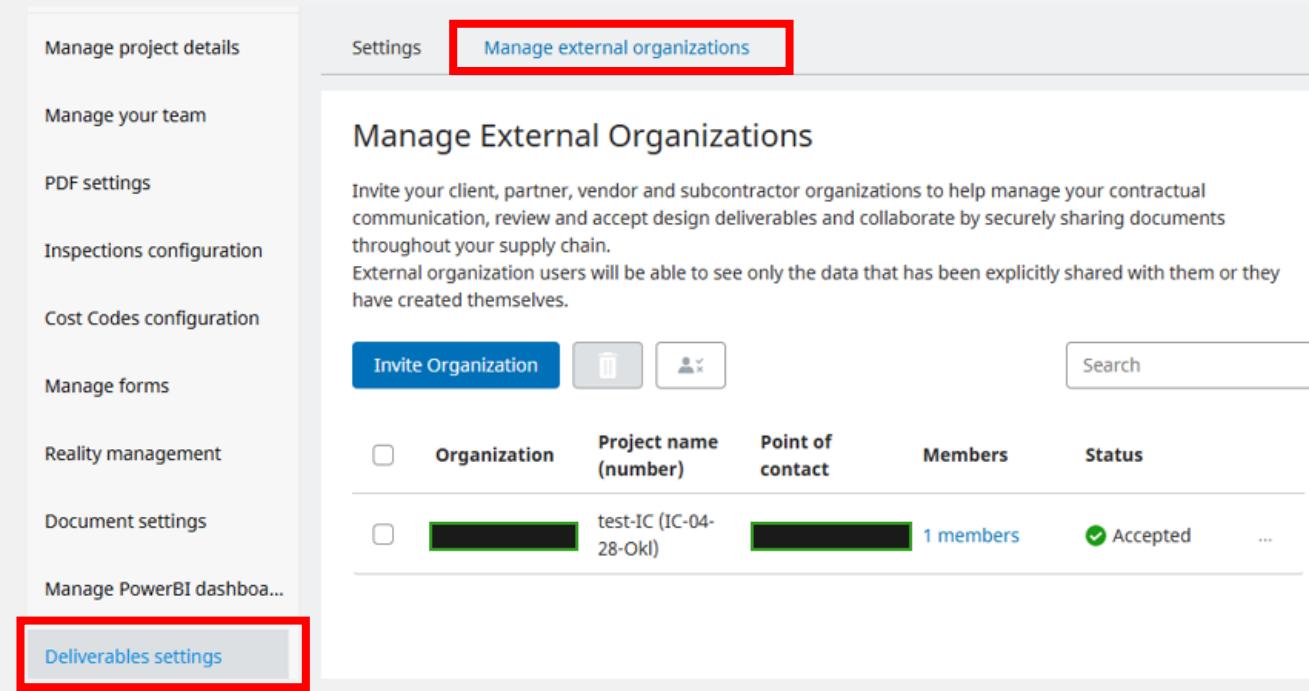
Enter an email address and click Send to receive a test notification

teresa.bouton@bentley.com Send

# Inviting External Users to Deliverables Management

One point of contact that has a Validate Entitlement will to be added here, they will manage the Project for their company. When you create the Portal Project. Invite your client, partner, vendor and subcontractor organizations to help manage your contractual communication, review and accept design deliverables and collaborate by securely sharing documents throughout your supply chain.

External organization users will be able to see only the data that has been explicitly shared with them or they have created themselves.



The screenshot shows the 'Manage external organizations' tab selected in the top navigation bar. A red box highlights the 'Deliverables settings' tab in the left sidebar. The main content area displays the 'Manage External Organizations' page, which includes a table with a single row of data and a 'Invite Organization' button. A modal window titled 'Invite External Organization' is open, prompting for the primary point of contact's email address and an optional message. A note at the bottom of the modal states that all Bentley cloud services users require a license.

Manage project details

Manage your team

PDF settings

Inspections configuration

Cost Codes configuration

Manage forms

Reality management

Document settings

Manage PowerBI dashboa...

Deliverables settings

Settings Manage external organizations

## Manage External Organizations

Invite your client, partner, vendor and subcontractor organizations to help manage your contractual communication, review and accept design deliverables and collaborate by securely sharing documents throughout your supply chain.

External organization users will be able to see only the data that has been explicitly shared with them or they have created themselves.

Invite Organization

Organization Project name (number) Point of contact Members Status

<input type="checkbox"/>	test-IC (IC-04-28-Okl)	<input type="checkbox"/>	1 members	<input checked="" type="checkbox"/> Accepted	...
--------------------------	------------------------	--------------------------	-----------	--	-----

Search

Invite External Organization

The primary point of contact will receive an email invitation to collaborate on this project. They will also be able to add additional colleagues from their organization to their project team.

Primary point of contact email address \*

Email

Include a custom message (optional)

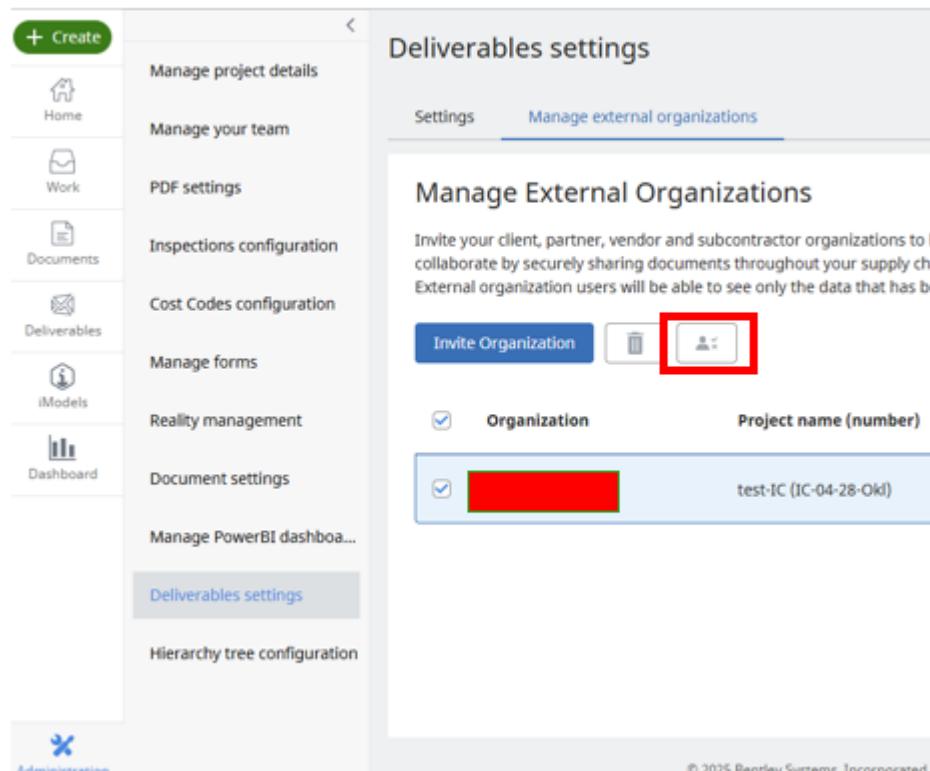
Comment for invite receiver

Note that all Bentley cloud services users (including invited collaborators from external organizations) require a license.

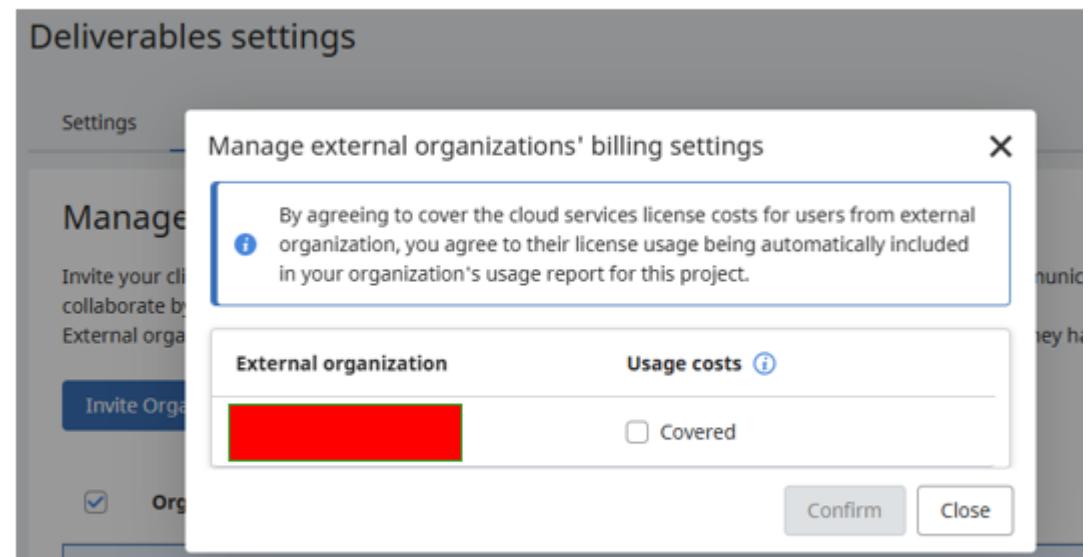
# Inviting External Users to Deliverables Management

Invite your client, partner, vendor and subcontractor organizations to help manage your contractual communication, review and accept design deliverables and collaborate by securely sharing documents throughout your supply chain. External organization users will be able to see only the data that has been explicitly shared with them or they have created themselves.

You now have the ability to cover the cost of their license by managing their billing settings as shown below



The screenshot shows the 'Deliverables settings' page with the 'Manage external organizations' tab selected. The 'Manage External Organizations' section contains a sub-section titled 'Manage external organizations' with a description of its purpose. It features an 'Invite Organization' button, a trash can icon, and a user icon with a plus sign. Below these are two input fields: 'Organization' (with a checked checkbox) and 'Project name (number)' (containing 'test-IC (IC-04-28-0k)').



The screenshot shows a modal dialog titled 'Manage external organizations' billing settings'. It contains a message about covering license costs for external organizations. Below is a table with two columns: 'External organization' and 'Usage costs'. The first organization listed has a 'Covered' checkbox checked. The dialog includes 'Confirm' and 'Close' buttons.

# PW Deliverables Management

## Send Confidential RFIs

### Introduction:

Mark an RFI confidential to keep its contents visible only to the issuer, admin, and named recipients. This update brings RFIs up to the same privacy standard already available for transmittals and general correspondence.

### Business value:

- Save hours and rework:** One checkbox replaces redacting PDFs or sending separate secure emails, freeing Document Controllers and Package Engineers from manual privacy work on every sensitive RFI.
- Cut compliance risk and costs:** Prevents accidental NDA breaches and the downstream legal / re-issue costs that come with exposing confidential data.
- Why now?** Key Accounts made RFI privacy a contract requirement for renewal and upsell; shipping today keeps those deals and maintains our parity with transmittals/GC.

### Key capabilities:

- Built into the normal “New RFI” flow** – toggle **Confidential Data Included** while creating (or during “Review & Issue”) to lock contents for issuer, admin, and named/CC’d recipients only.
- Reduce noise, keep awareness** – Teams still see that an RFI exists but aren’t distracted by content they don’t need, improving focus and audit clarity.
- Available across all Portals (BIC, Connect & PW365).**

### Key Customers who asked for (validated) this:

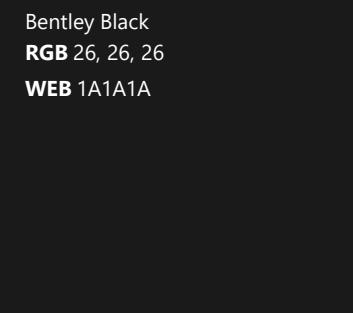
SRLA | Jacobs | GHD | Siemens | WSP | MDOT | Aurecon Group

The image consists of three vertically stacked screenshots of a software interface for managing RFIs.   
1. The top screenshot shows the 'RFI draft' screen with a red box highlighting the 'Draft, new' status. The 'Question' tab is selected. The 'Project' field is set to 'DEMO PWDM'. A checkbox labeled 'Confidential data included' is checked and highlighted with a red box.   
2. The middle screenshot shows the 'User Creates & Sends Confidential RFI' screen. It displays an 'Incoming' list with one item: 'Requesting to review document ID: DEMO project PWDM-OutRFI...'. The status is 'Confidential package'.   
3. The bottom screenshot shows the 'Confidential RFI | Recipient - No Access' screen. It displays the same incoming RFI item. The status is 'Issued'. A blue 'Acknowledge' button is visible.   
4. The bottom-most screenshot shows the 'Confidential RFI | Recipient - Full Access' screen, which is identical to the previous one but with a different status, likely 'Acknowledged'.

# Our Colors

## CMYK | RGB | WEB | PMS

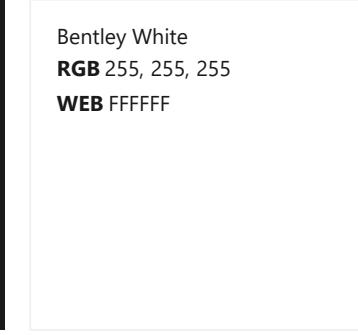
The Bentley color palette has been carefully crafted and has evolved to convey the ideas of a stable, professional, technical, and modern software company. The use of the colors represents the overall brand and maintains a sense of consistency throughout Bentley's marketing.



Bentley Black

**RGB** 26, 26, 26

**WEB** 1A1A1A



Bentley White

**RGB** 255, 255, 255

**WEB** FFFFFF

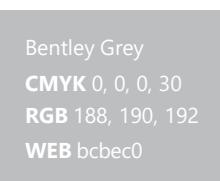


Bentley Green

**RGB** 68, 214, 44

**WEB** 44D62C

**Pantone** 802 C

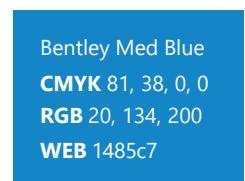


Bentley Grey

**CMYK** 0, 0, 0, 30

**RGB** 188, 190, 192

**WEB** bcbec0

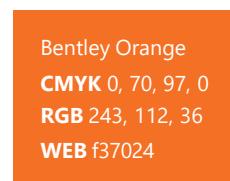


Bentley Med Blue

**CMYK** 81, 38, 0, 0

**RGB** 20, 134, 200

**WEB** 1485c7



Bentley Orange

**CMYK** 0, 70, 97, 0

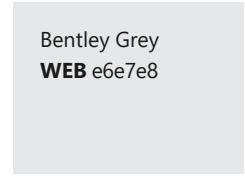
**RGB** 243, 112, 36

**WEB** f37024



Bentley Grey

**WEB** d1d3d4



Bentley Grey

**WEB** e6e7e8

# Bentley PowerPoint Resources (hyperlinked)

All can be found on [Branding Portal](#)

## **PowerPoint Support Graphics Library**

Inventory of graphics aligned with Corporate messaging, which should be proliferated in our presentations for consistency in how we communicate storylines. These graphics are also designed as PowerPoint objects to provide flexibility for color changes as needed.

## **Pre-made Slide Layouts**

Some pre-designed slide layouts for some of the more common use cases (be sure to check the presenter notes for more details on each slide).

## **Industry Divider Slides**

These are now hosted as a separate file to keep this main template simplified and a smaller file size.