ProjectWise Deliverables Management Overview and Best Practices for Administrators

Training Overview

2025

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Senior Consultant

Bentley

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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.

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Deliverables Management

What is it?

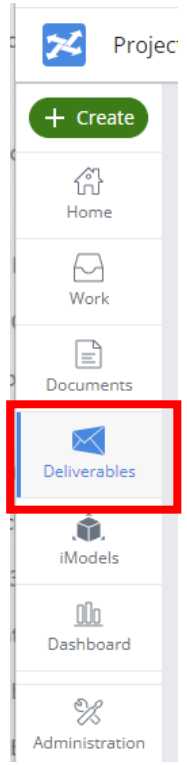
ProjectWise Deliverables Management provides secure deliverables exchange between business entities. It ensures that deliverables package information can be trusted, speeds up preparation process, and makes it easy to identify and resolve urgent issues.

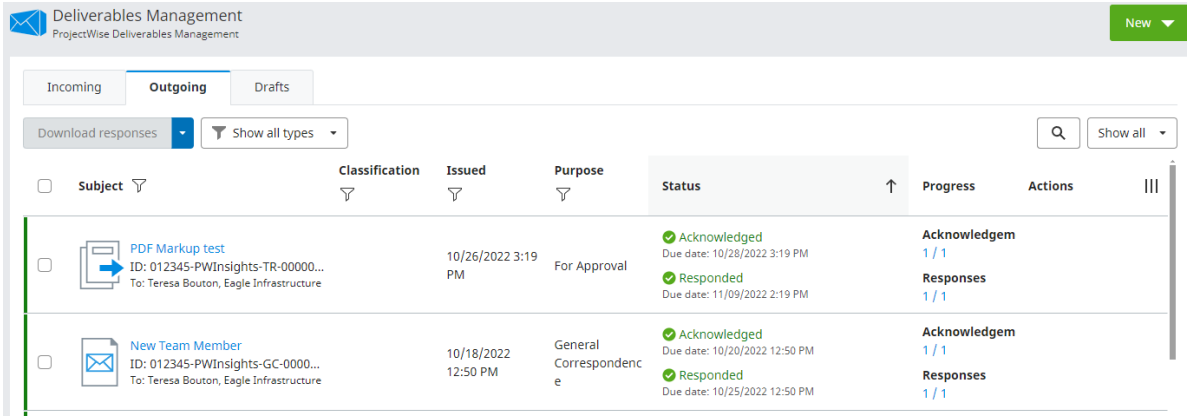
Key benefits:

•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





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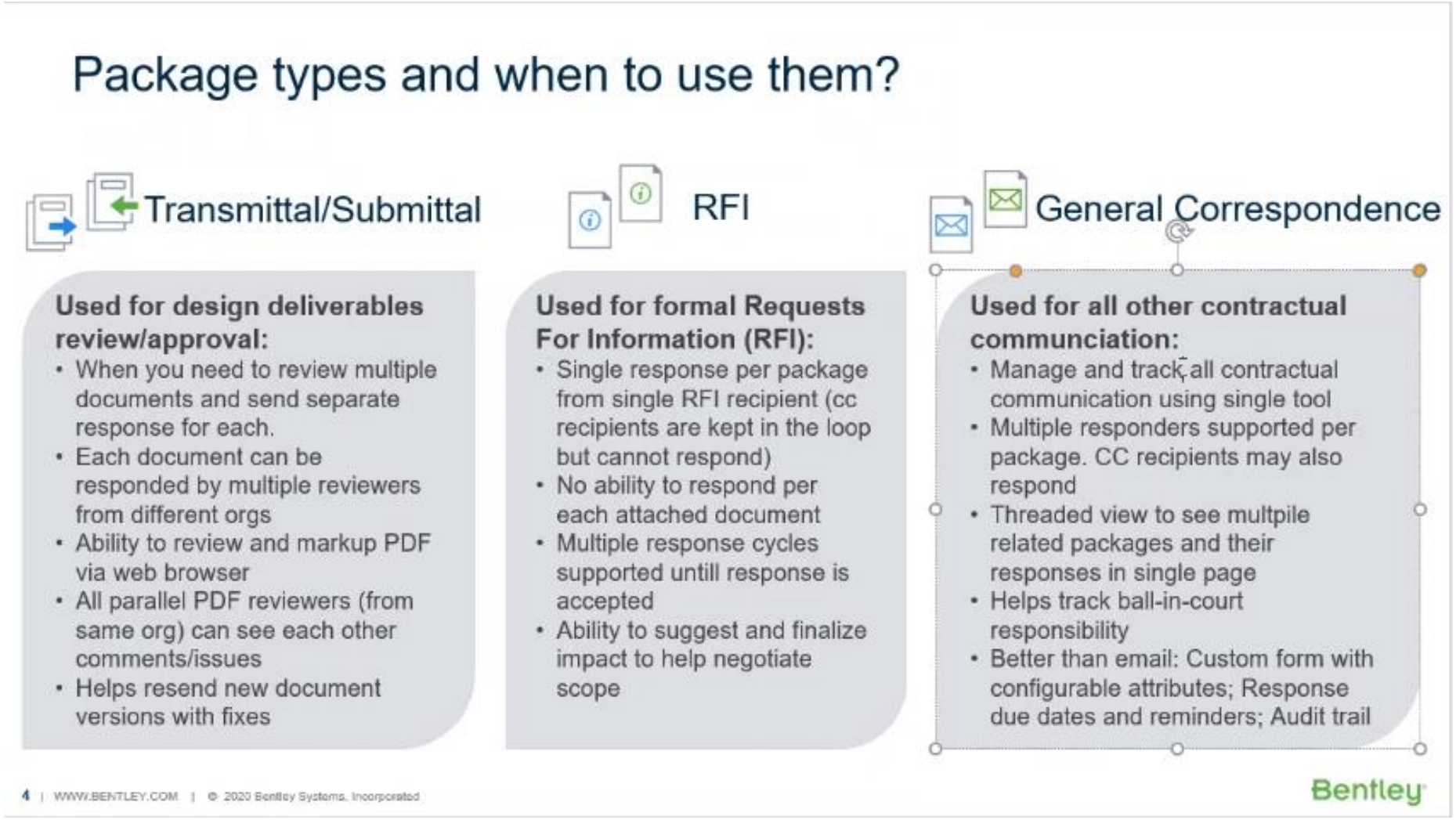
Deliverables Management Overview



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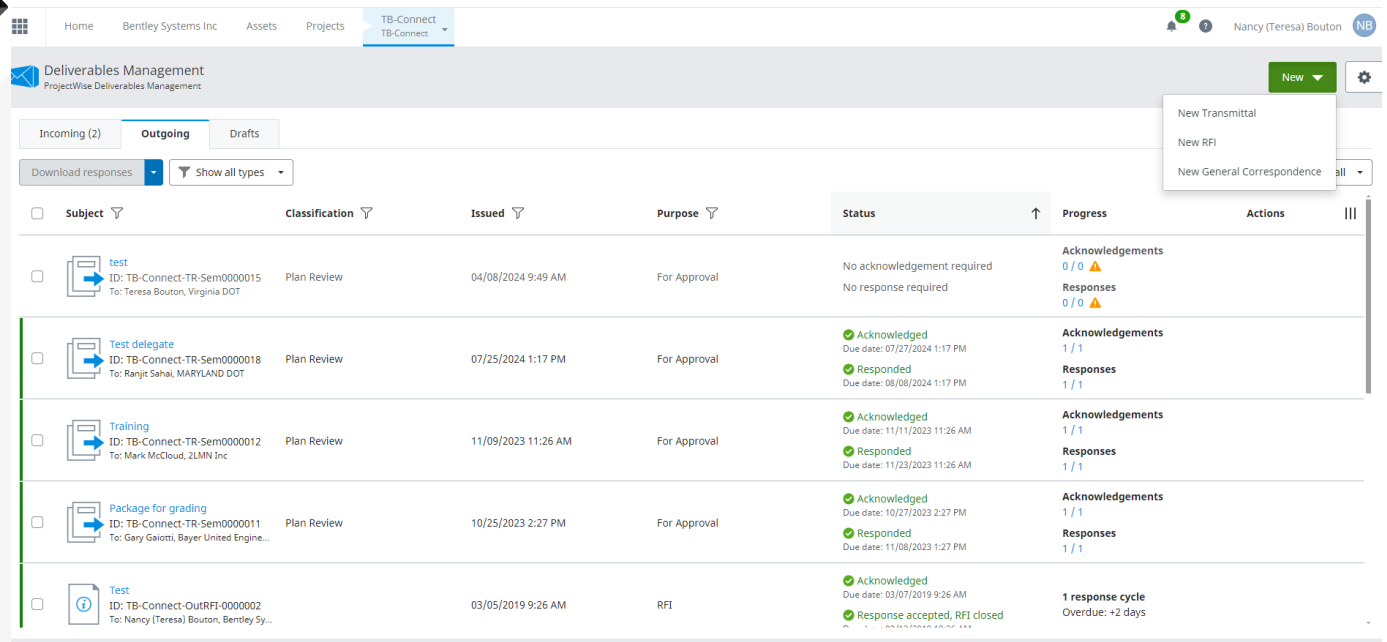
Deliverables Management Overview

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

Deliverables Management Settings in a Transmittal



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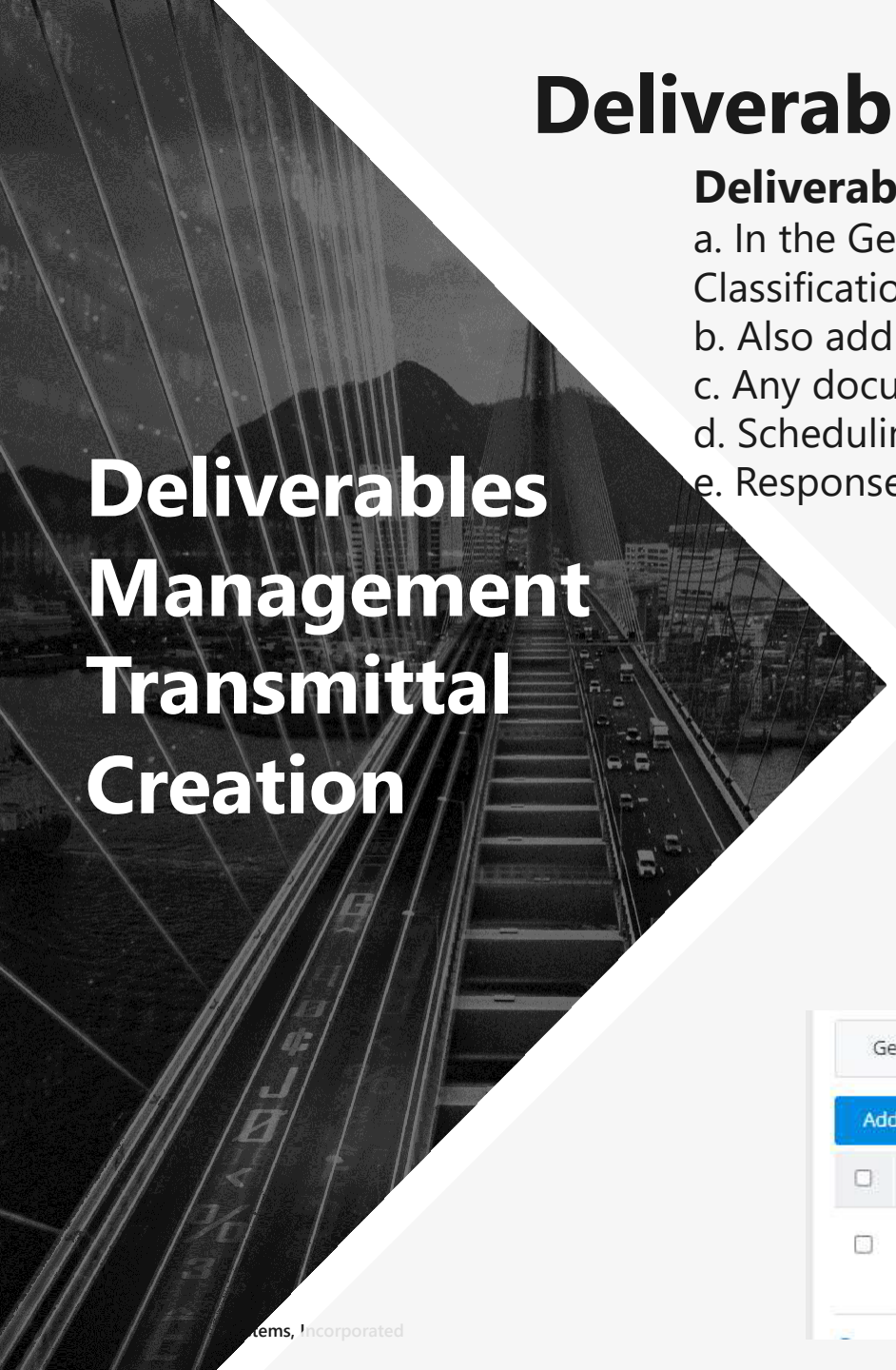
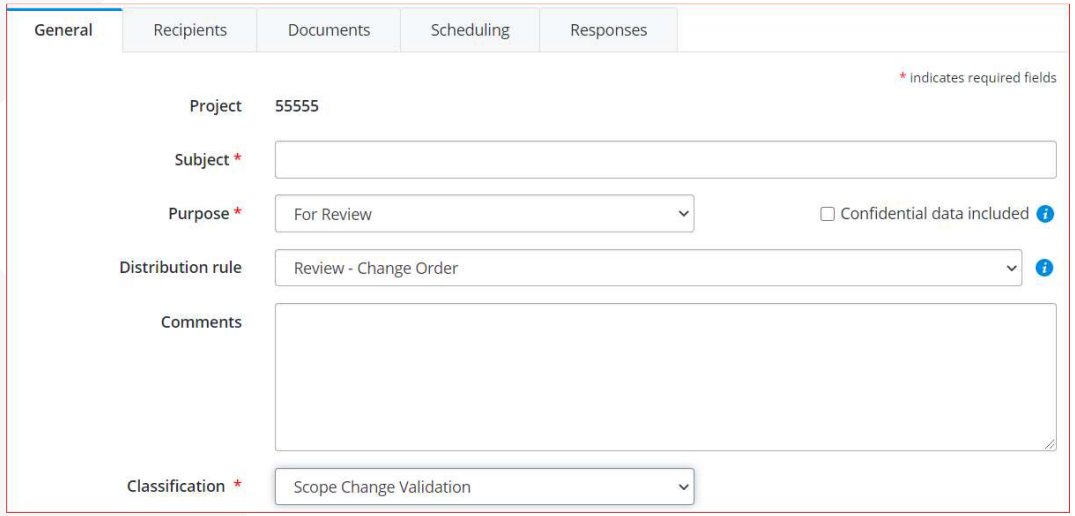
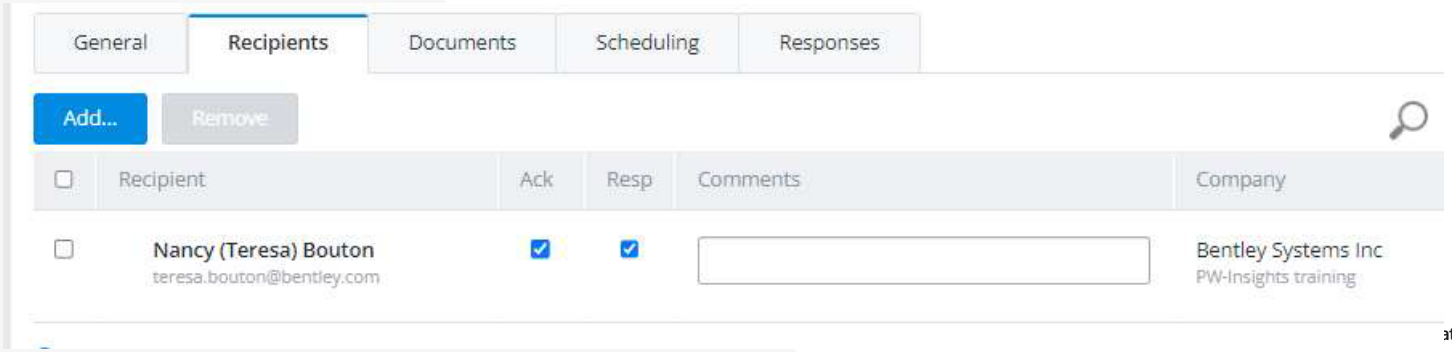
Deliverables Management Overview

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







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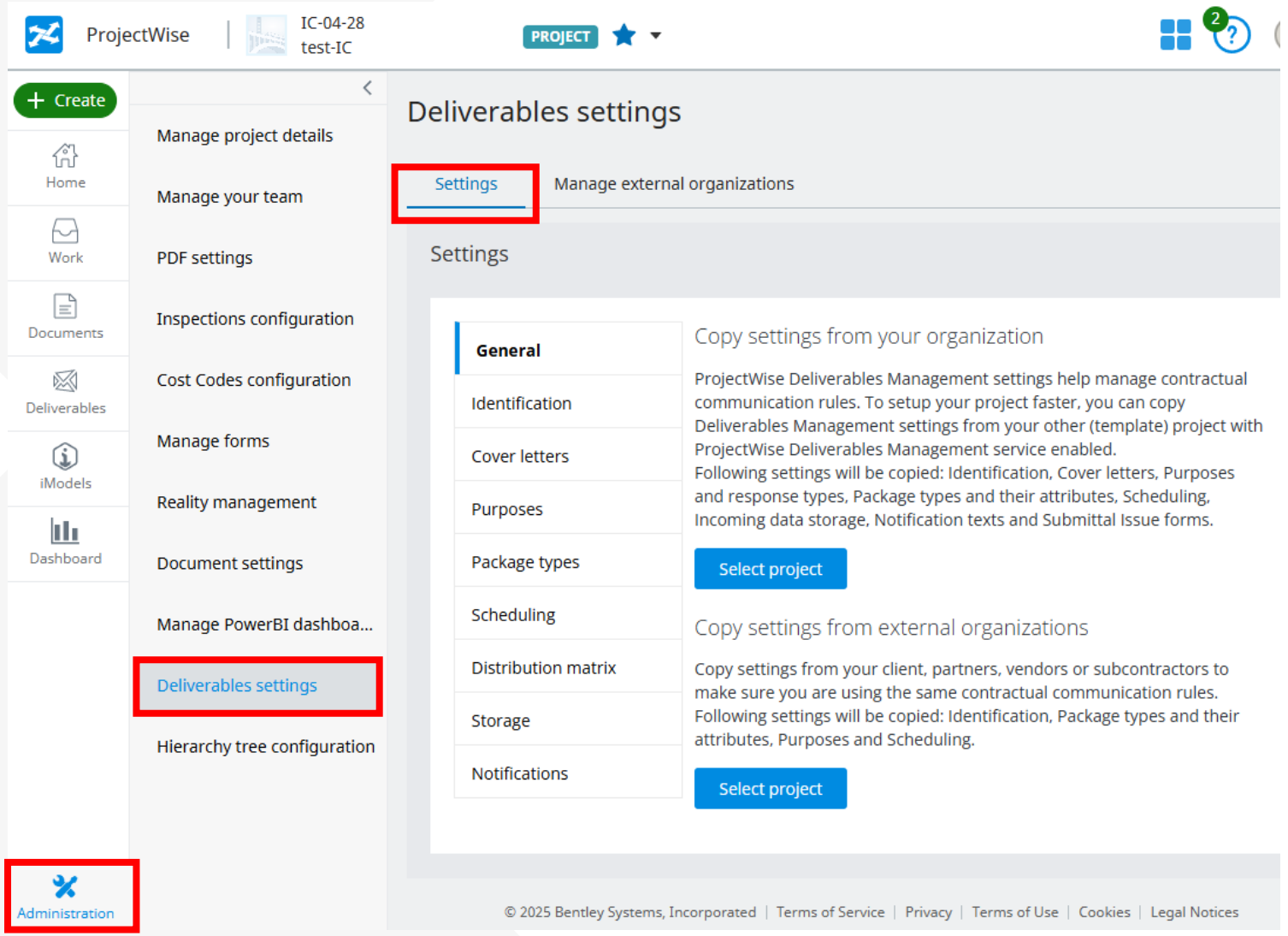
Deliverables Management Settings

Access Deliverables Management Settings



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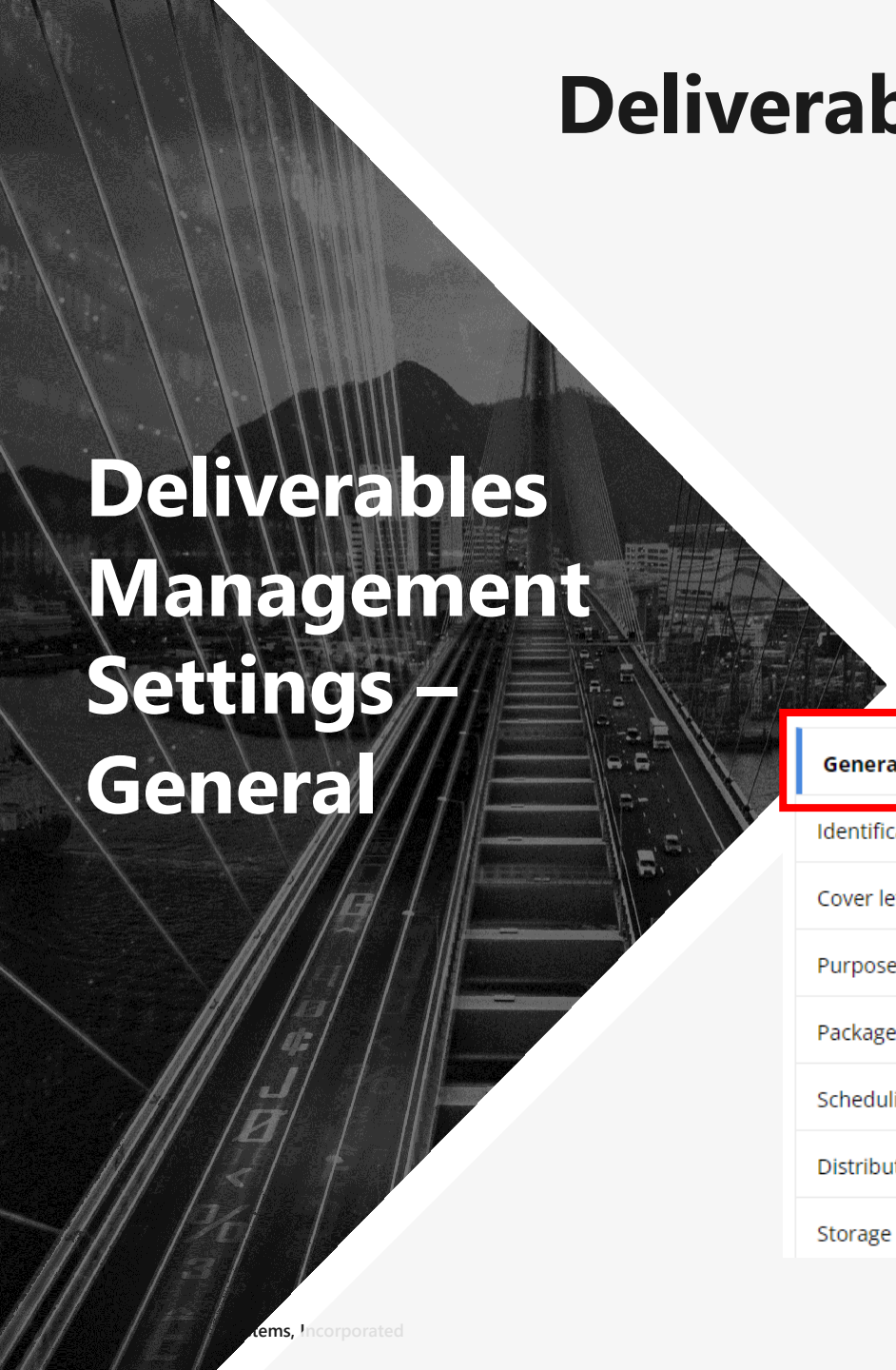
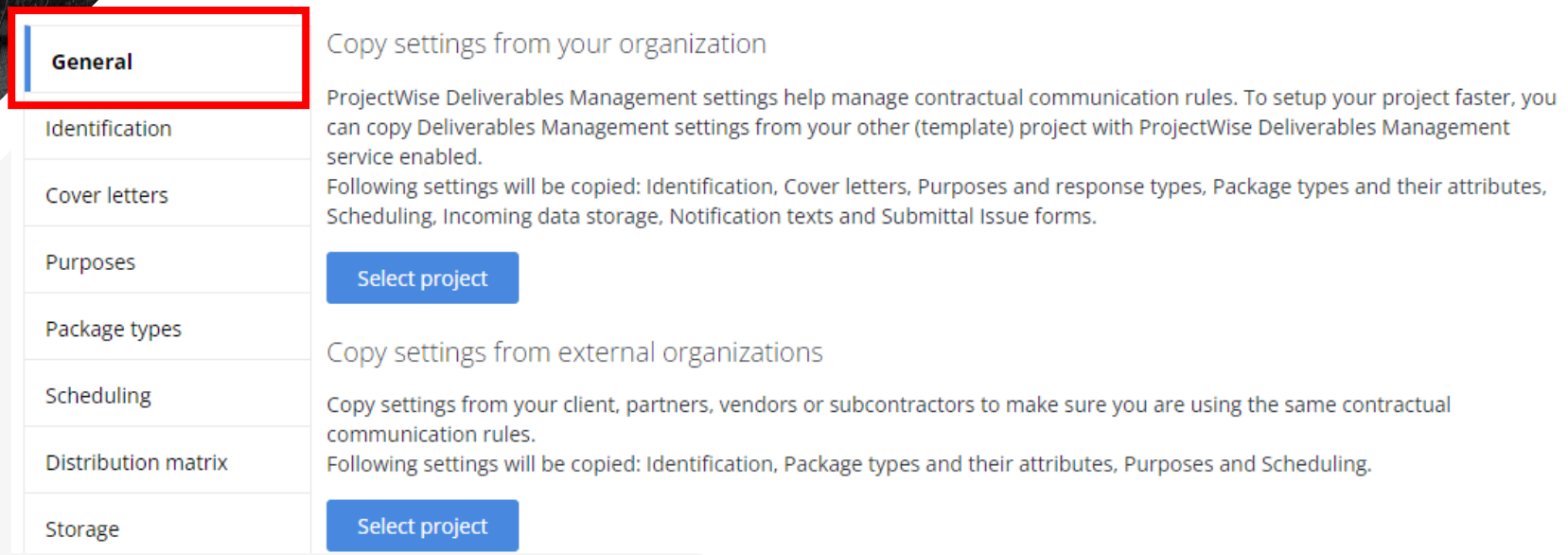
Deliverables Management Settings



General Settings Tab

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



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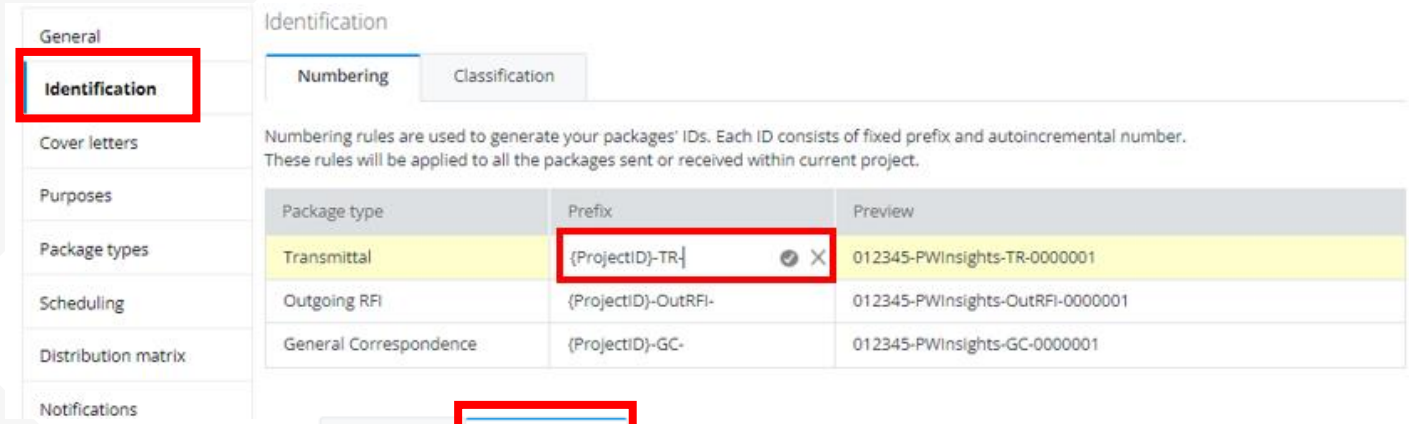
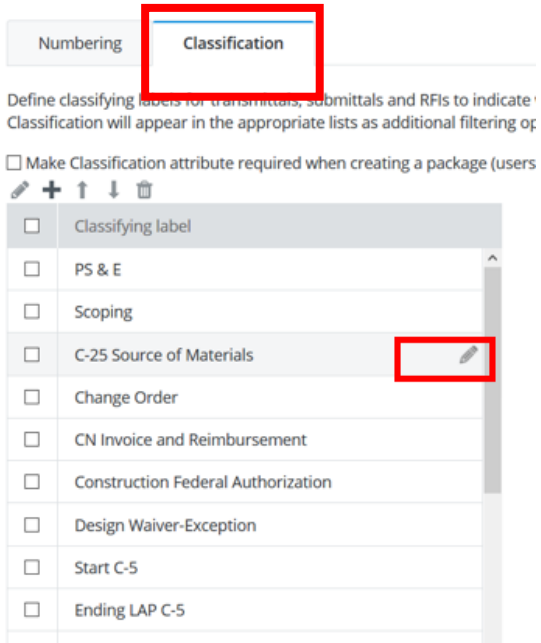
Deliverables Management Settings

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





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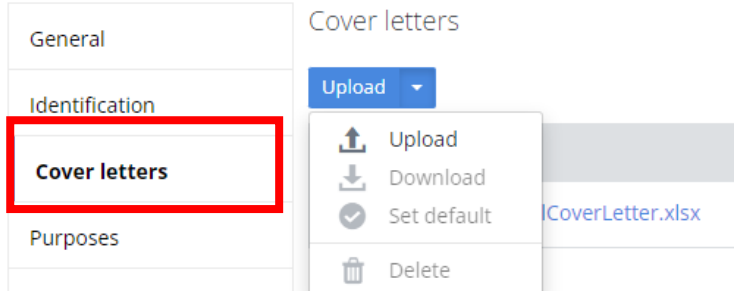
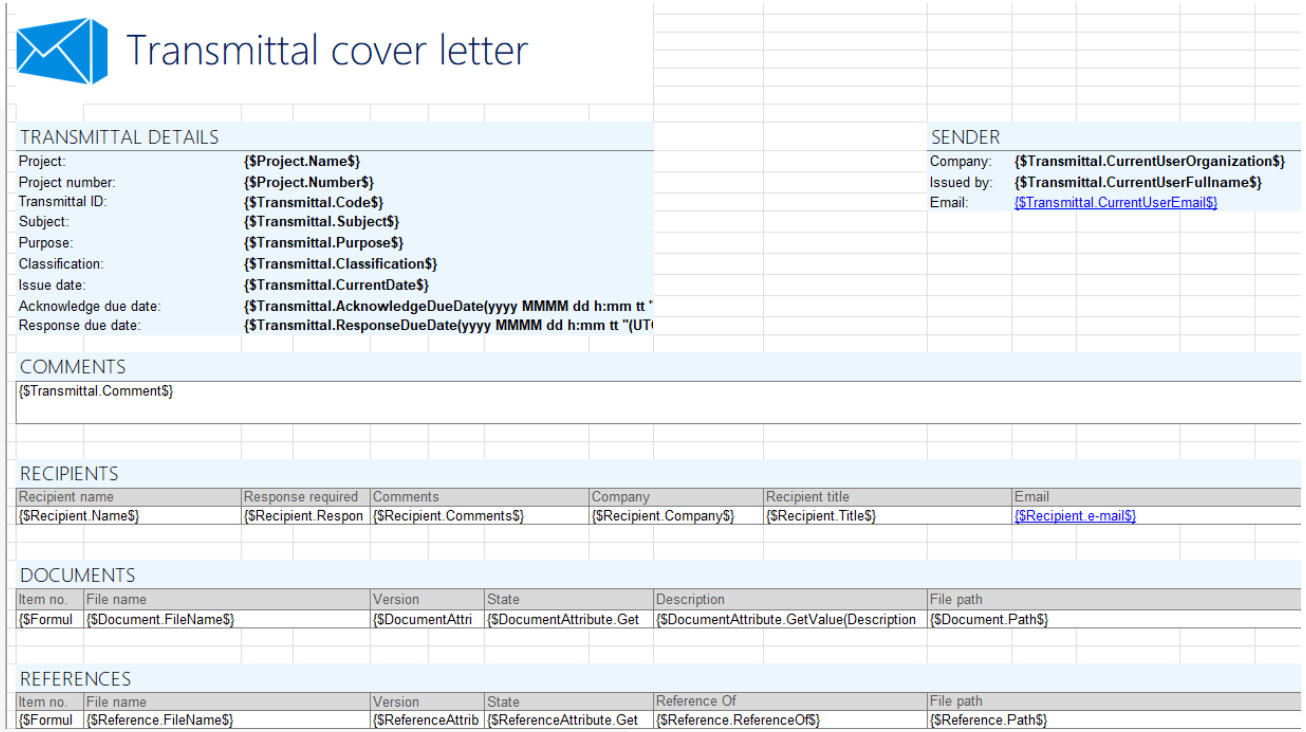
Deliverables Management Settings

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





Transmittal cover letter

TRANSMITTAL DETAILS		SENDER	
Project:	{$Project.Name$}	Company:	{$Transmittal.CurrentUserOrganization$}
Project number:	{$Project.Number$}	Issued by:	{$Transmittal.CurrentUserFullname$}
Transmittal ID:	{$Transmittal.Code$}	Email:	{$Transmittal.CurrentUserEmail$}
Subject:	{$Transmittal.Subject$}		
Purpose:	{$Transmittal.Purpose$}		
Classification:	{$Transmittal.Classification$}		
Issue date:	{$Transmittal.CurrentDate$}		
Acknowledge due date:	{$Transmittal.AcknowledgeDueDate(yyyy MMMM dd h:mm tt "		
Response due date:	{$Transmittal.ResponseDueDate(yyyy MMMM dd h:mm tt "(UT		

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 – Cover Letters

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Deliverables Management Settings

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

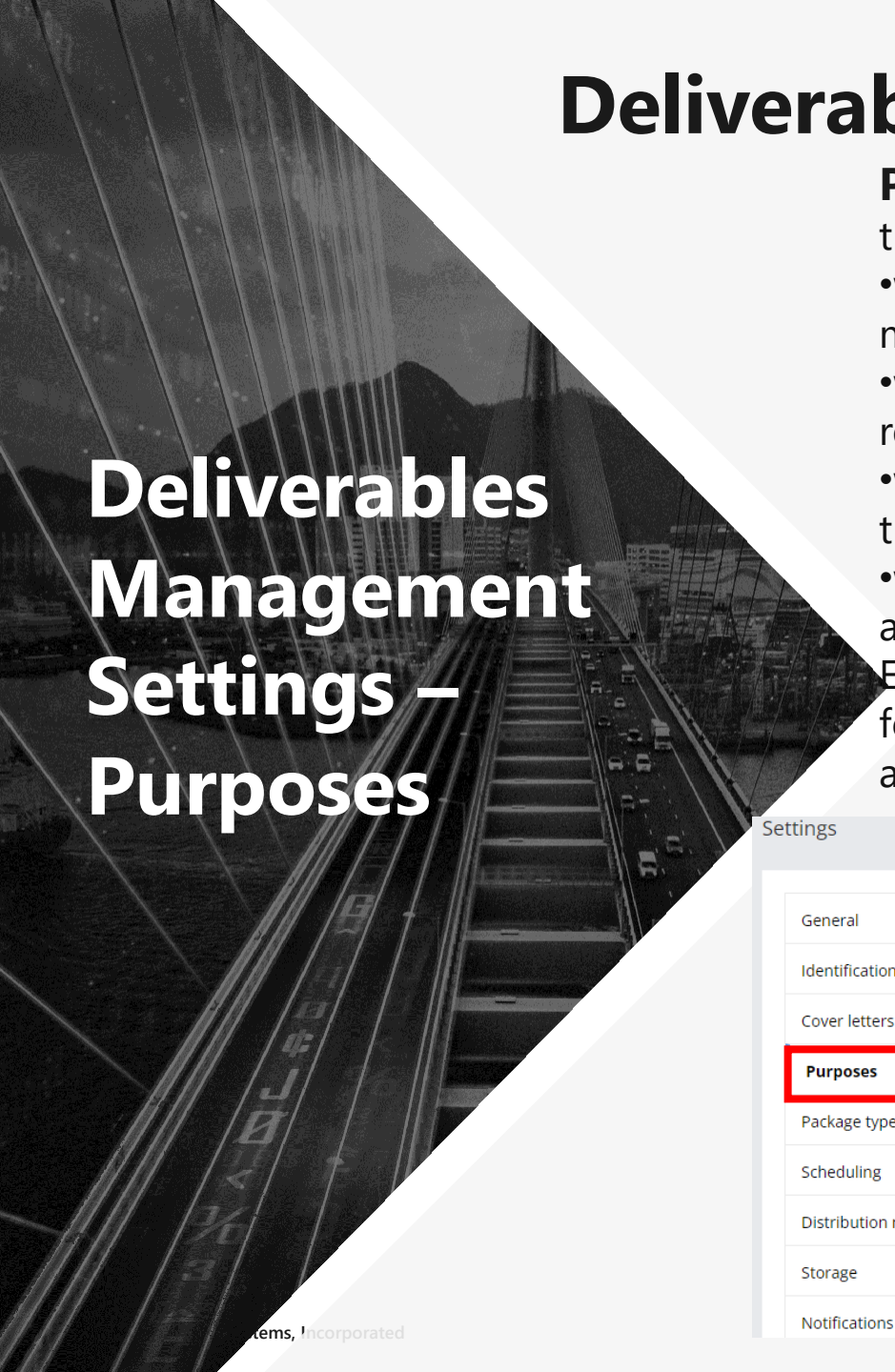
•which reply actions are turned on or off by default for each participant that is manually added as a recipient to the transmittal draft

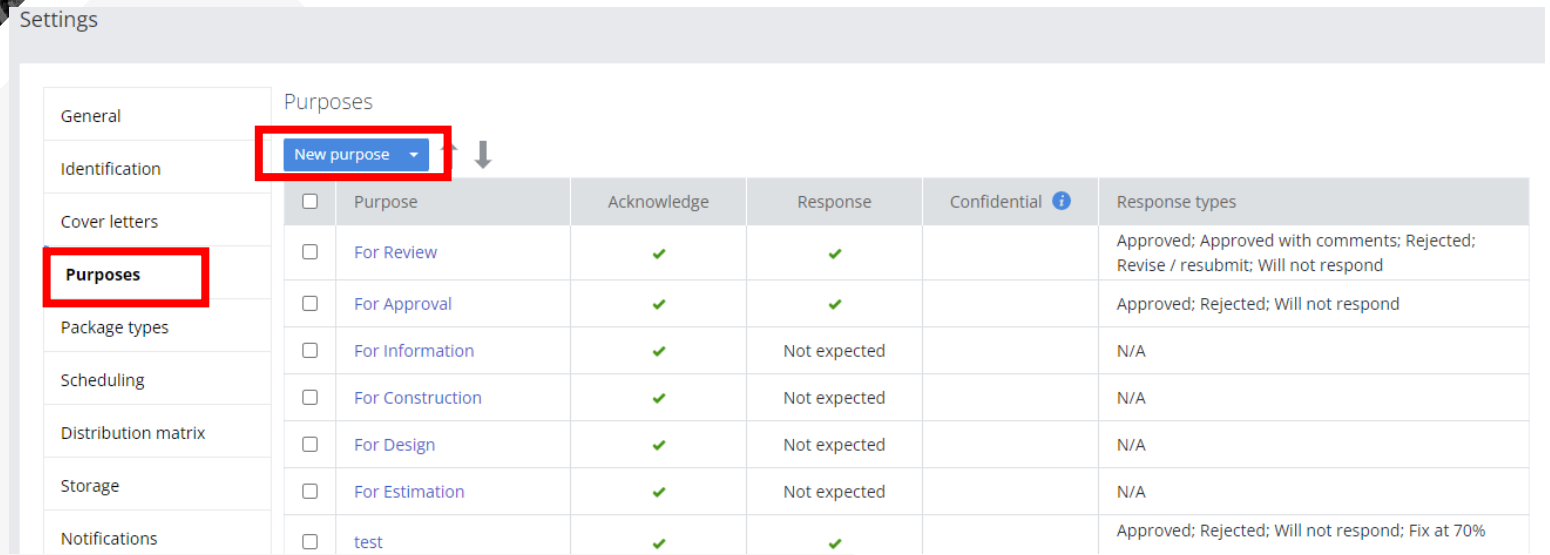
•which response options the recipients can choose from, if they are required to respond

•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.





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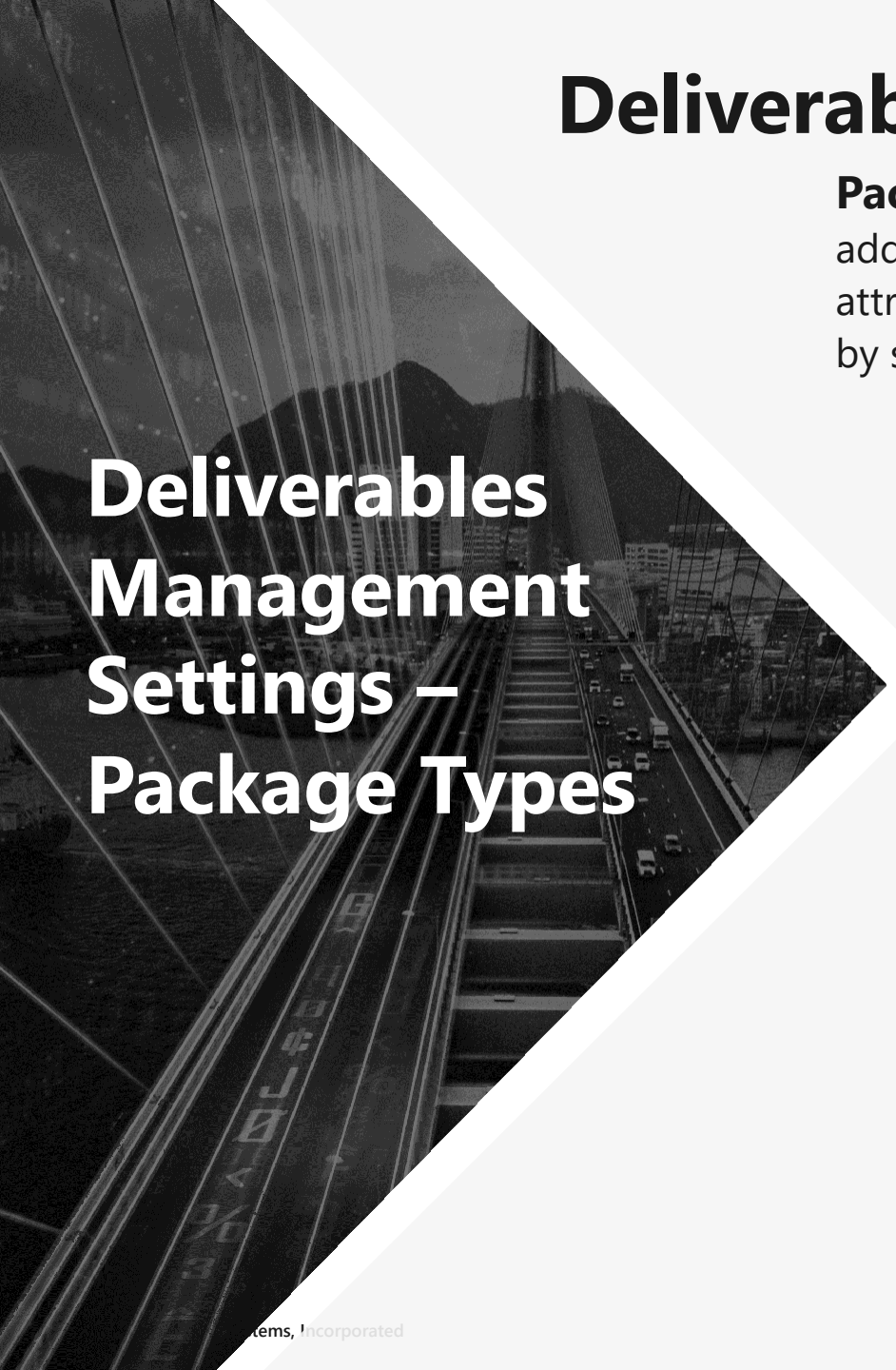
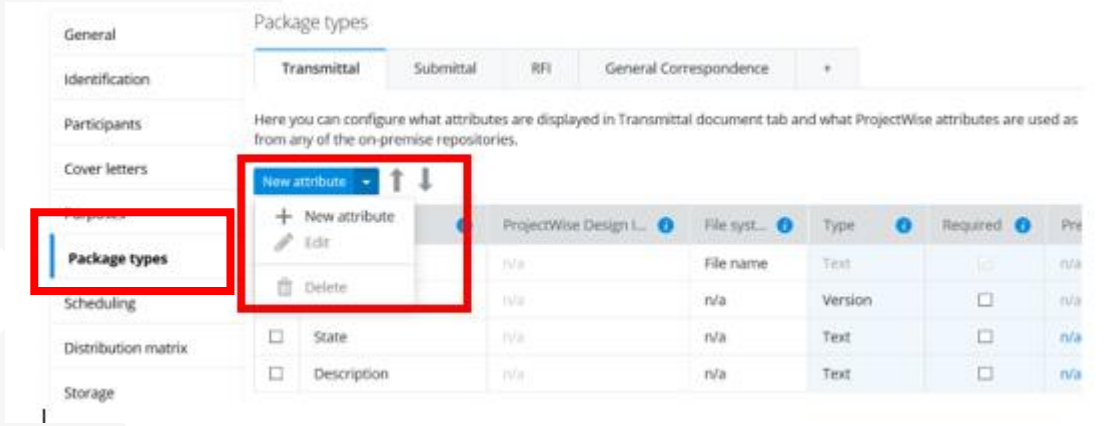
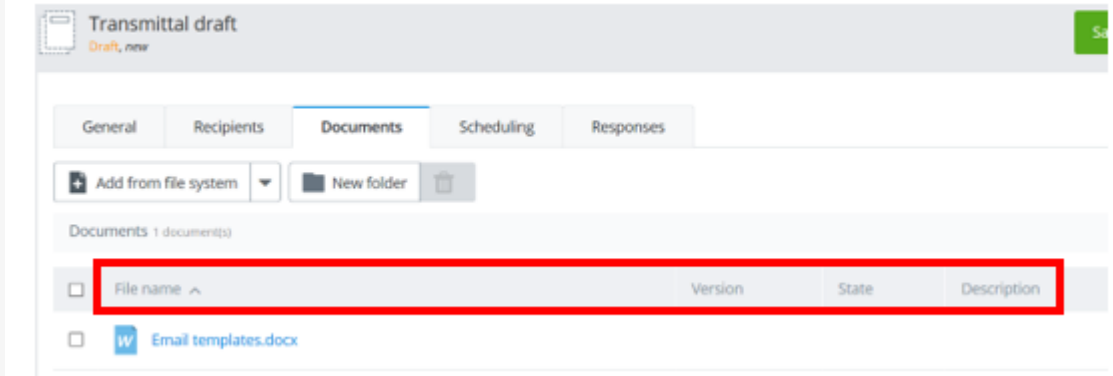
Deliverables Management Settings

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





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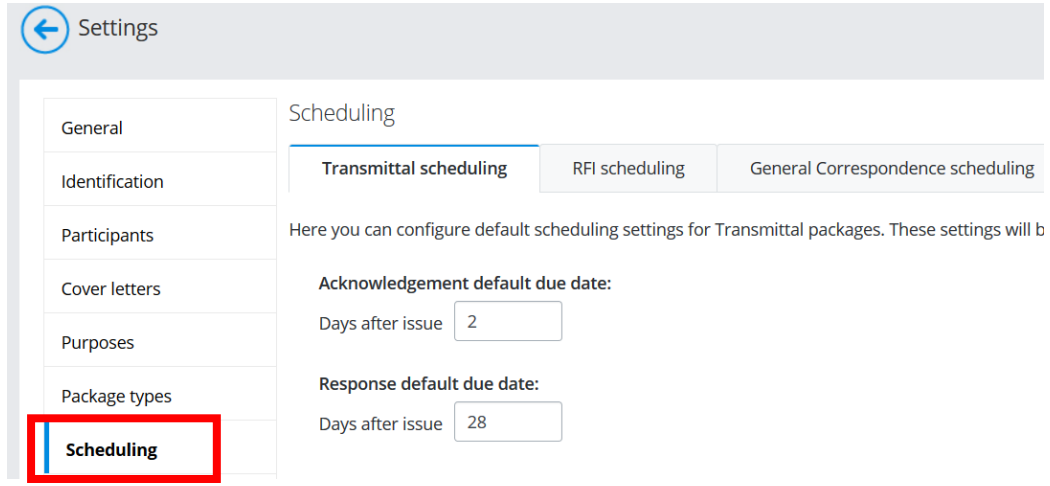
Deliverables Management Settings

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



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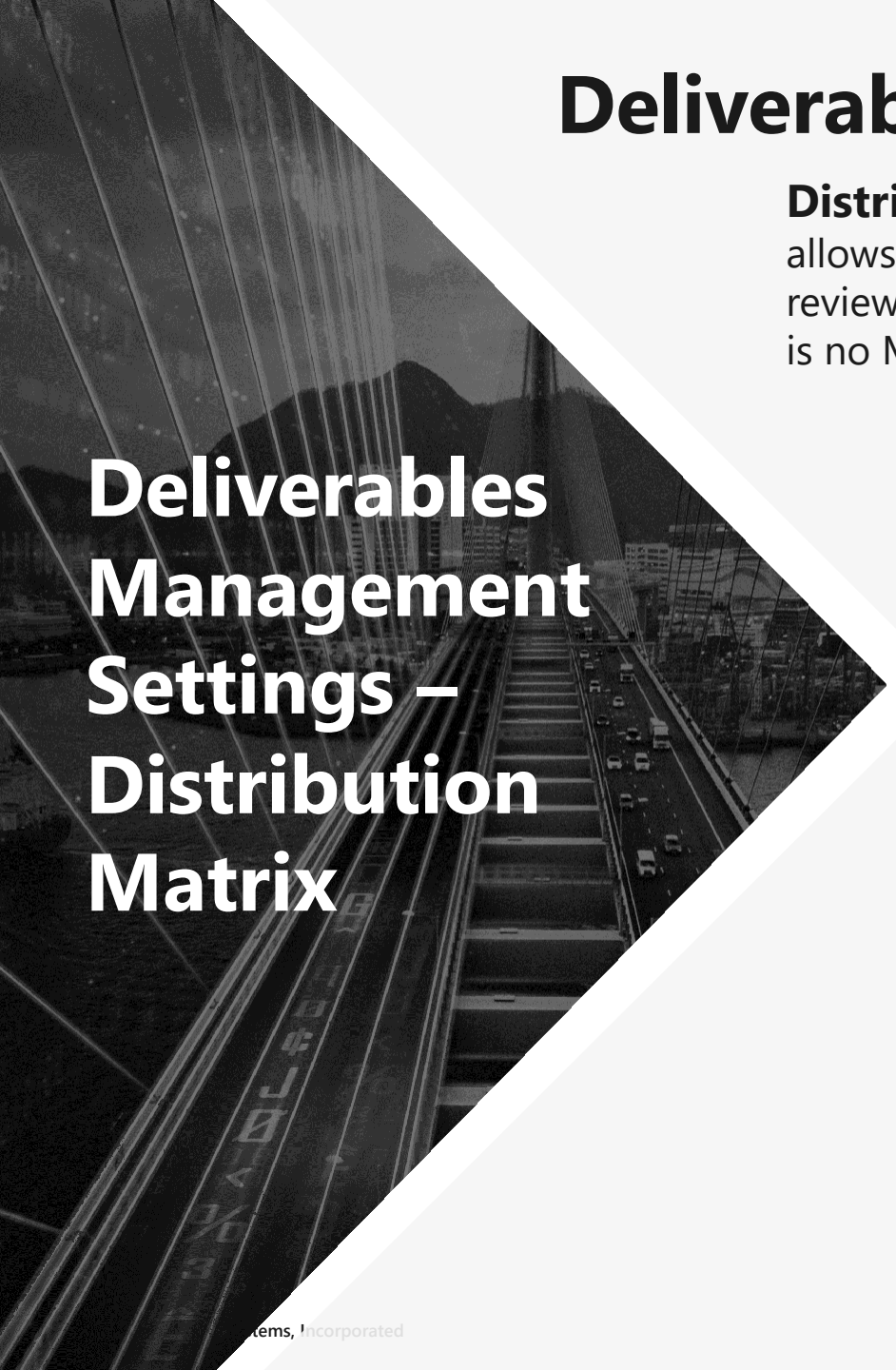
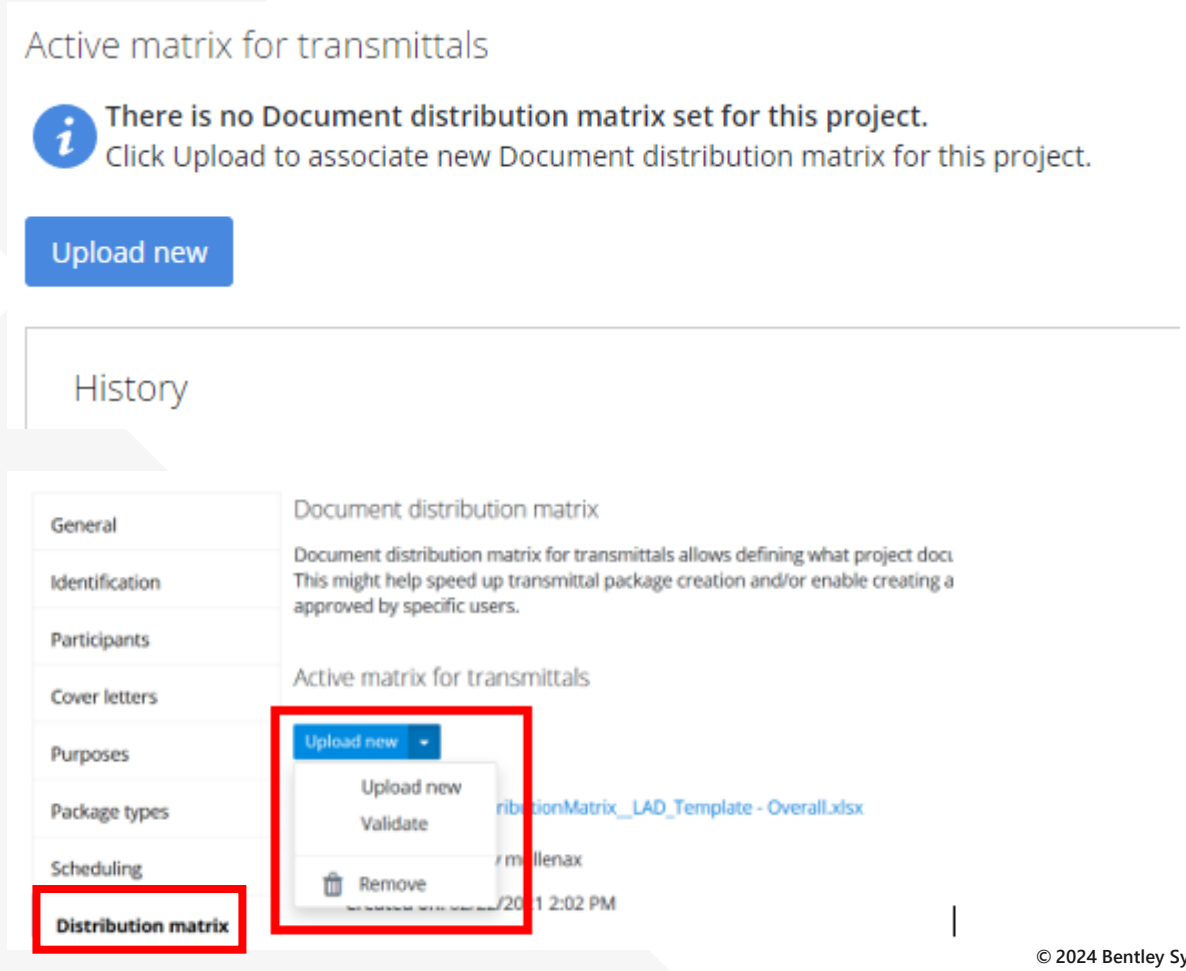
Deliverables Management Settings

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.





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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
1	$purpose	$name	$responsePeriod	$attribute	$attribute	$attribute	$attribute	$recipient	$recipient	$recipient	$recipient	$recipient	$recipient	$comment
2														
3				Attributes				Recipients						
4								teresa.bouton@bentley.com, adrian.crowfoot@bentley.com, arpit.prakash@bentley.com	bill.digregorio@bentley.com, anderson.mancebo@bentley.com, linh.ha@bentley.com	teresa.bouton@eaglle.bentley.com	bobby.mullenax@bentley.com	kestutis.gircys@bentley.com	jim.kanya@bentley.com	
5	Package Purpose	Name	Max Response Period (calendar days)	File name	Version	State	Description	Role1	Role2	Role3	Role4	Role5	Role6	Comment
6	For Review	For Review-DocType1	14					IA		I	R+"some text comment"	IA	I	DocType1
7	For Review	For Review-DocType2	14					R	IA		IA	I	I	DocType2
8	For Approval	For Approval-DocType3	14					I		R	IA	I	IA	DocType3
9	For Approval	For Approval-DocType4	14					I	IA	R	I	IA		DocType4
10	For Information	For Information-DocType5	14						I	I		IA+"some text comment"	IA	DocType5
11	For Information	For Information-DocType6	14						I	IA		IA	I	DocType6
12	For Construction	For Construction-DocType7	14					I		IA	IA		I	DocType7
13	For Construction	For Construction-DocType8	14					I		IA	IA	I		DocType8
14	For Design	For Design-DocType9	14							I	IA	I	IA	DocType9
15	For Design	For Design-DocType10	14						IA	I	IA		I	DocType10
16	For Estimation	For Estimation-DocType11	14						I+"some text comment"	IA		I	IA	DocType11
17	For Estimation	For Estimation-DocType12	14						I	I		IA	IA	DocType12
18	test	test-DocType13	14					IA	I	IA		R	I	DocType13
19	test	test-DocType14	14					R	IA		IA	I	I	DocType14

DDMTemplate | Tutorial | ValidationData

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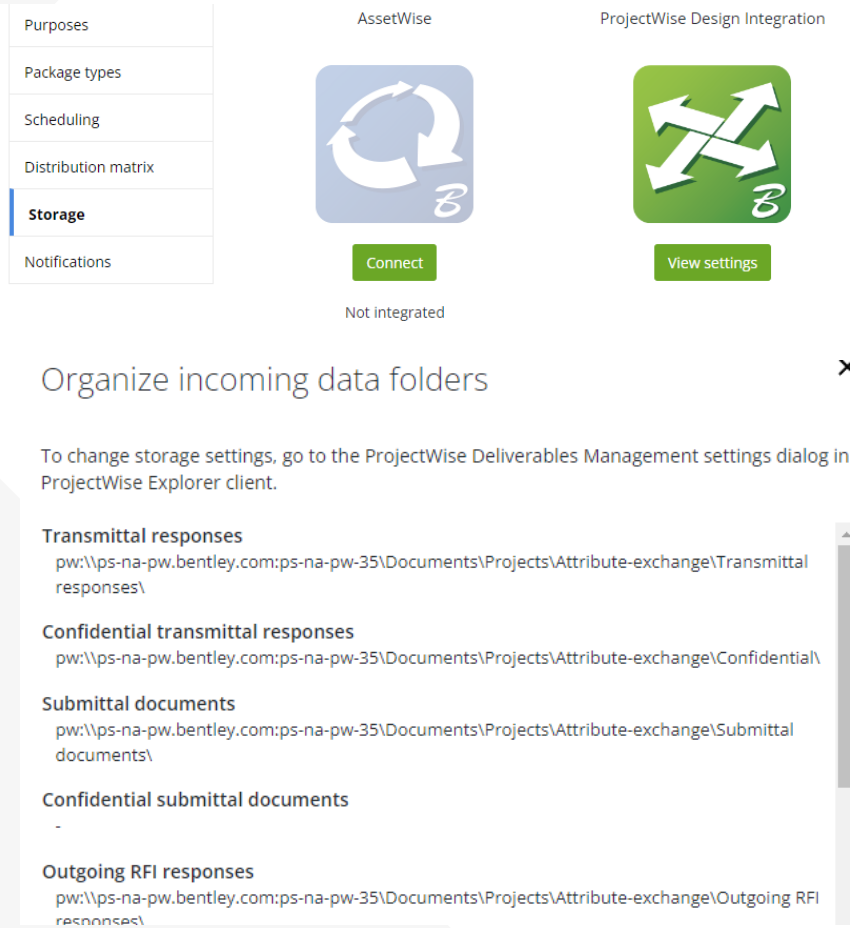
Deliverables Management Settings – Storage

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



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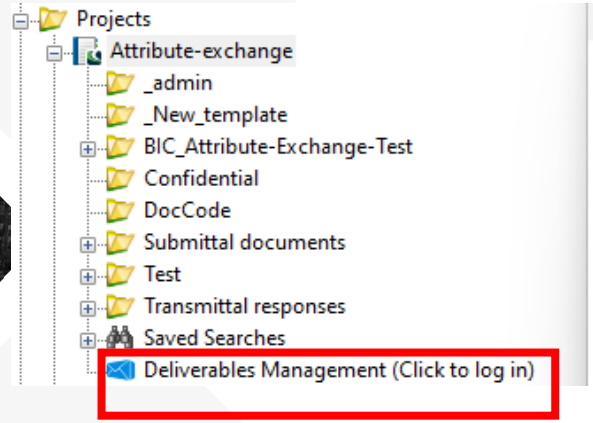
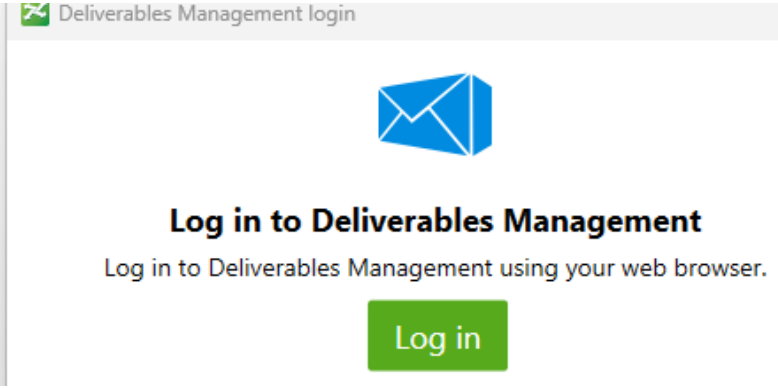
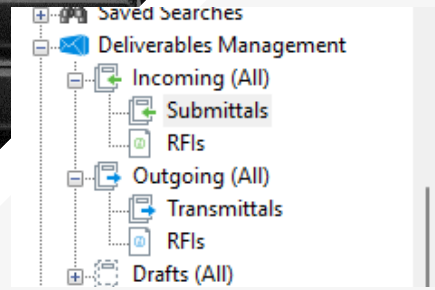
Deliverables Management Settings

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







ID	Subject	Classification	Issued	Purpose
IC-04-28-TR-0000003	Testing 123		6/18/2024 9:52 AM	For Review
IC-04-28-TR-0000005	test more	Environmental	8/26/2024 9:39 AM	For Approval
IC-04-28-TR-0000004	Classified	Environmental	6/18/2024 10:30 AM	For Approval

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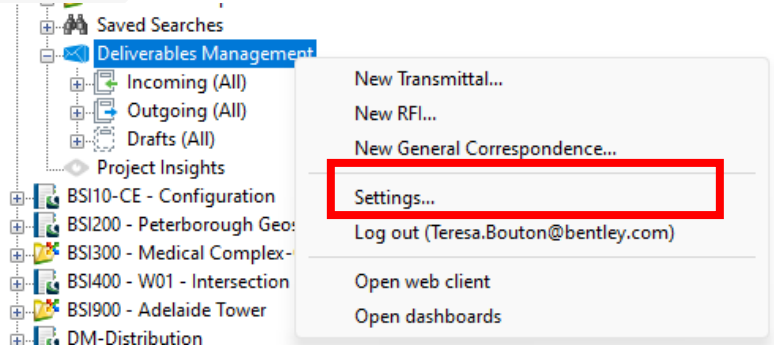
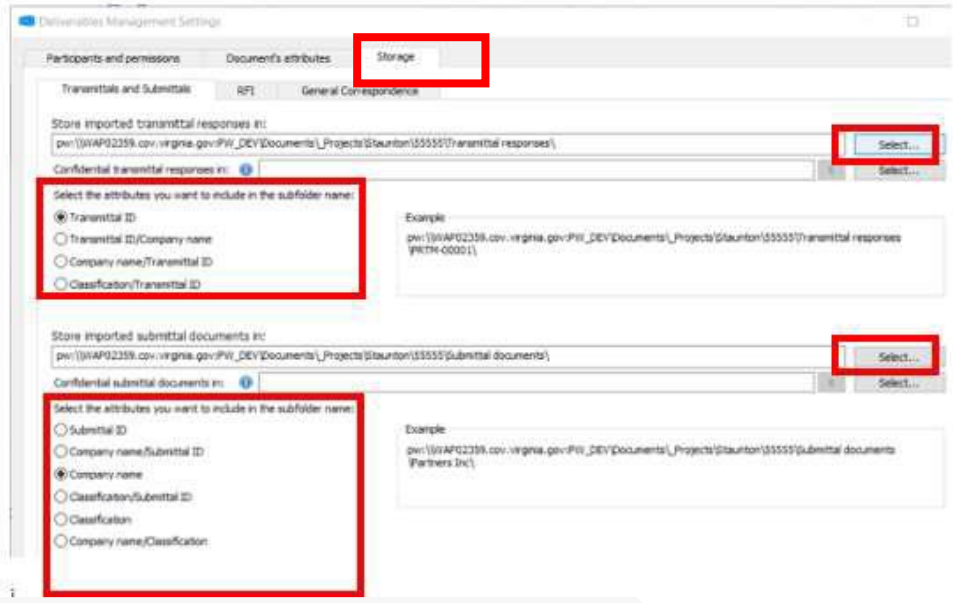
Deliverables Management Settings

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





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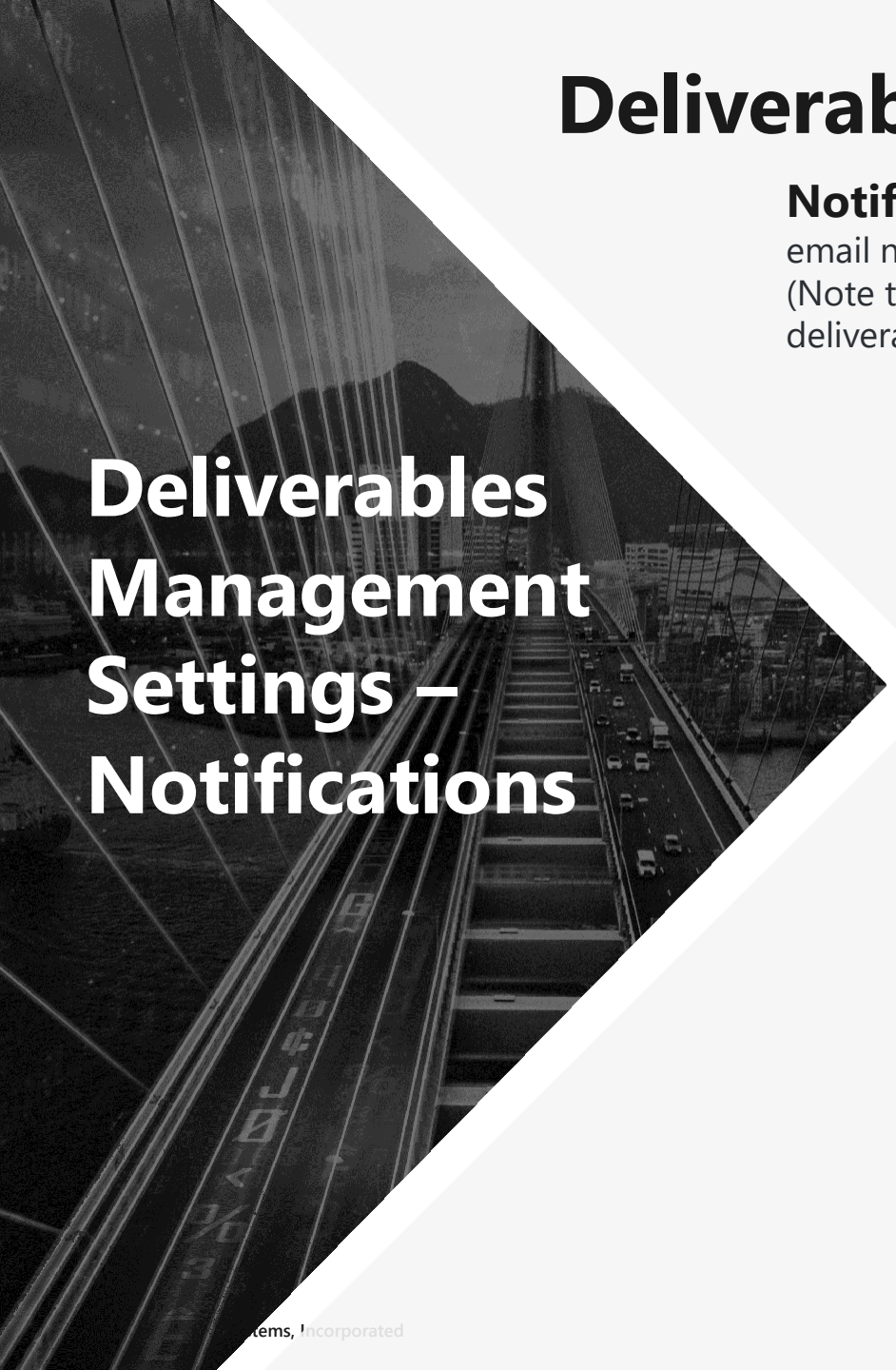
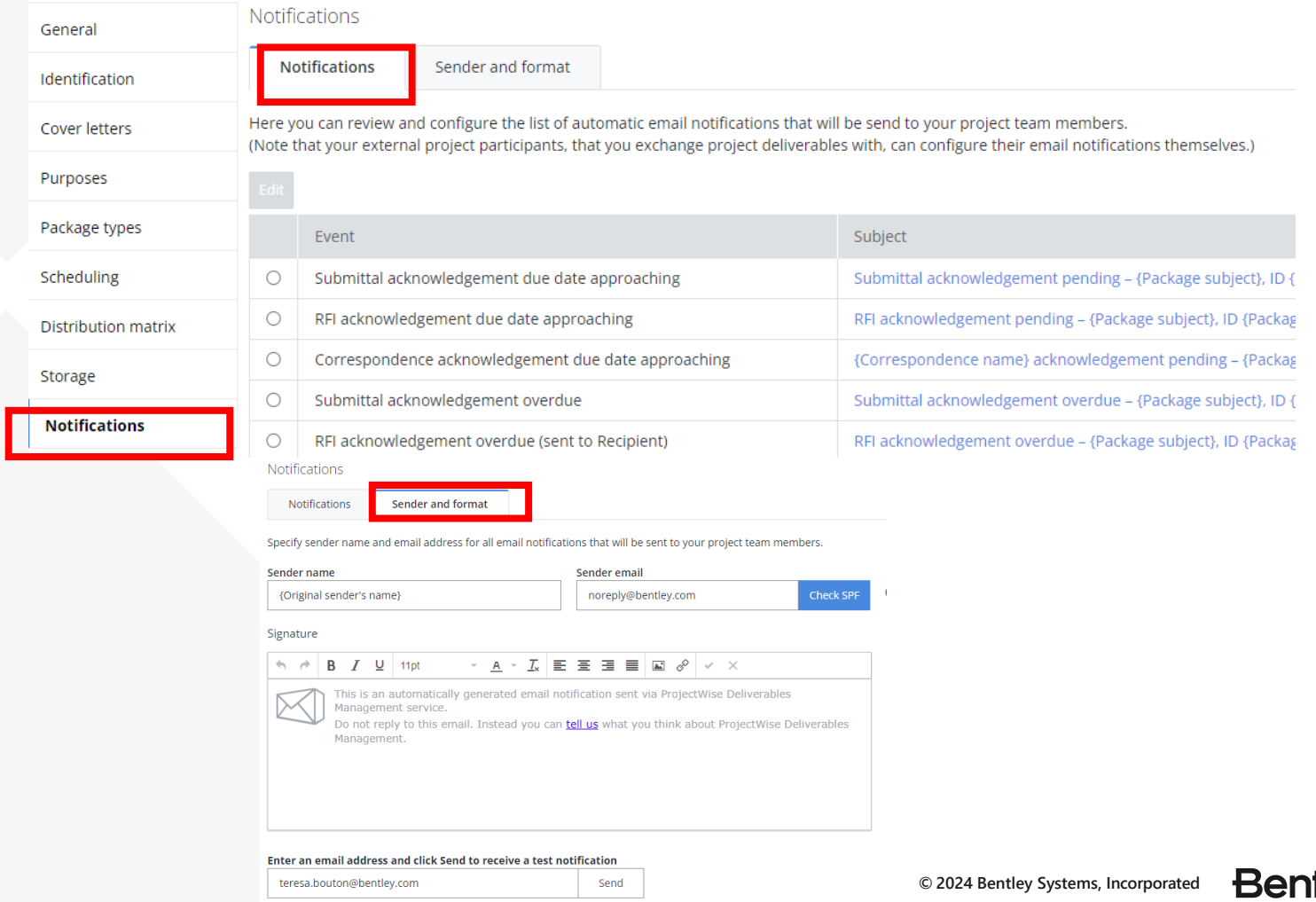
Deliverables Management Settings

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





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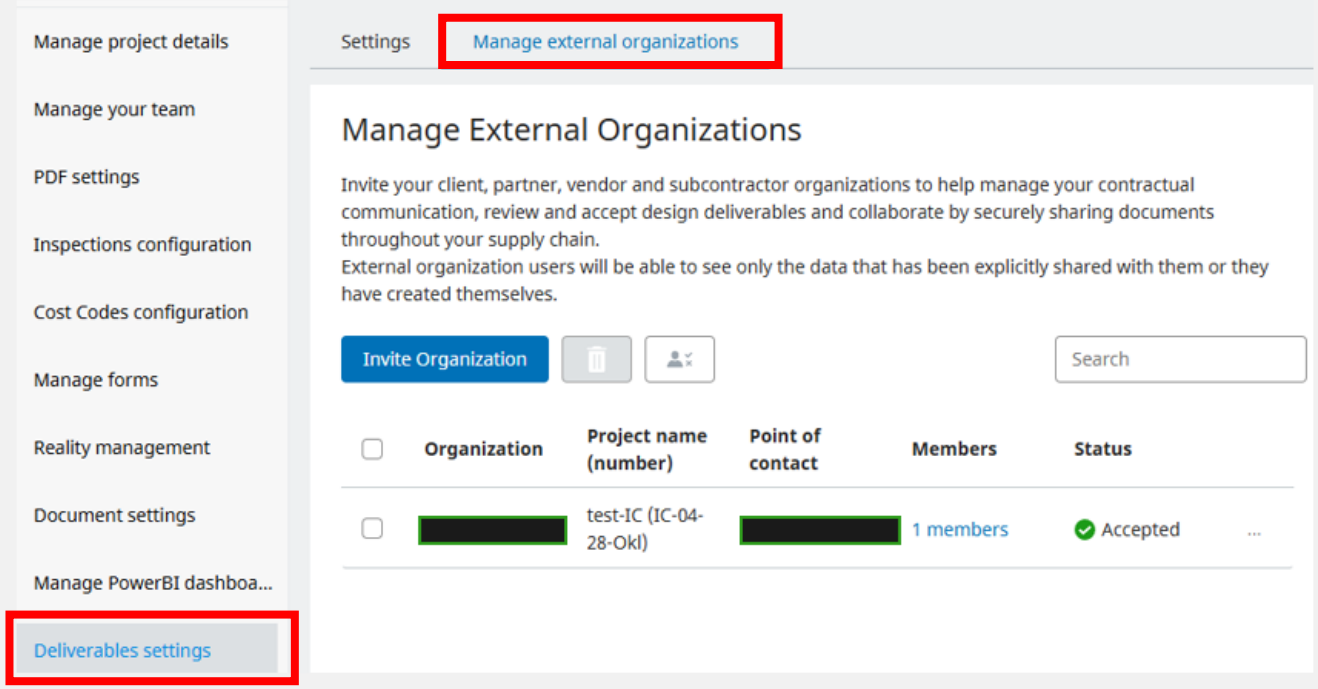
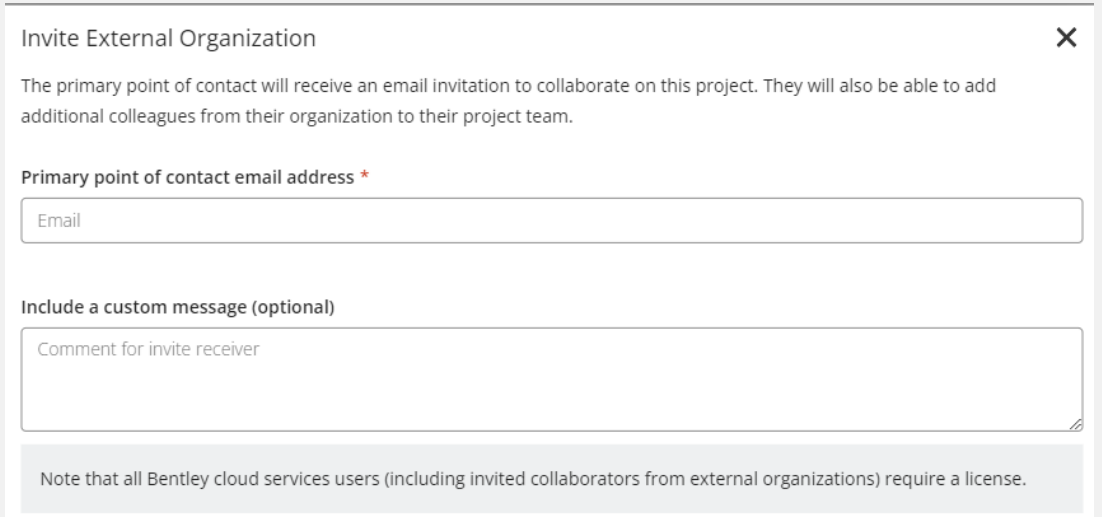
Inviting External Users to Deliverables Management

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.





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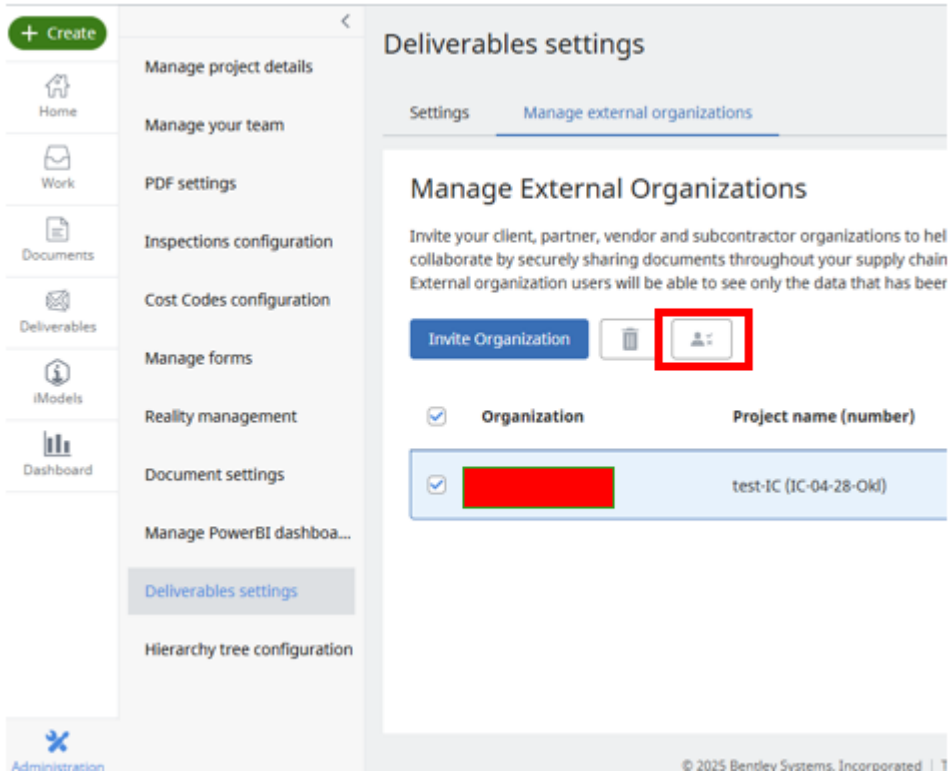
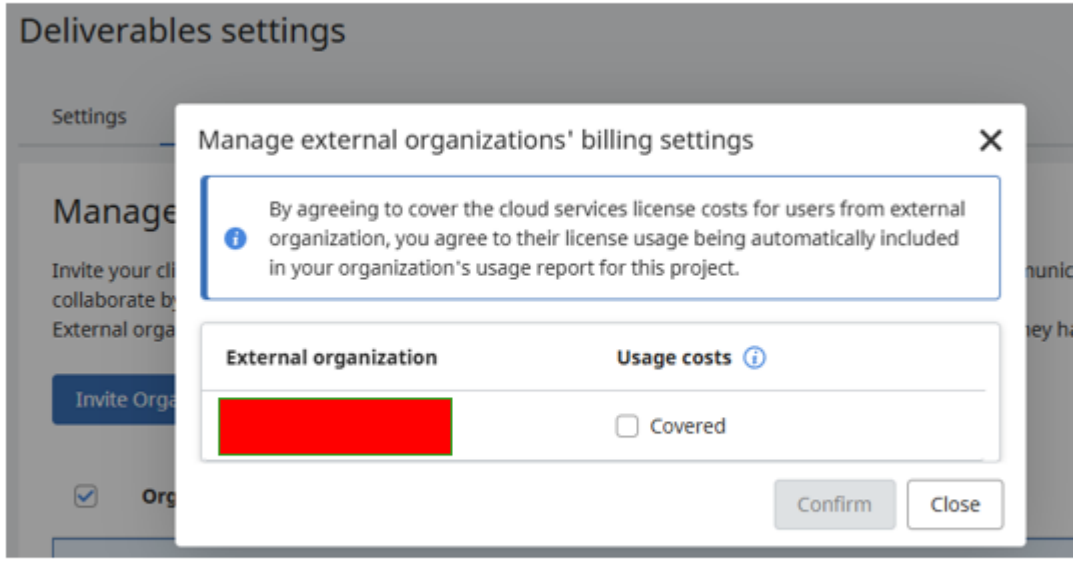
Inviting External Users to Deliverables Management

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





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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:

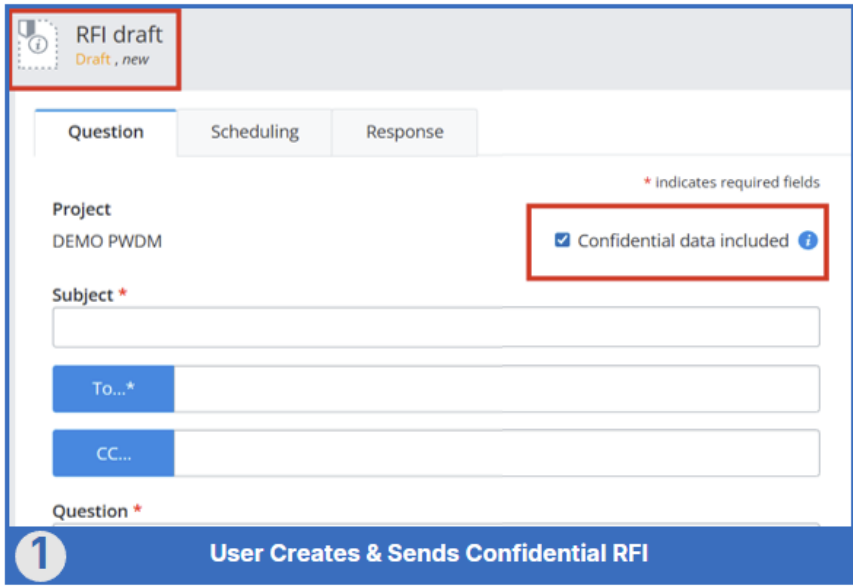
- **Save hours and rework**: One checkbox replaces redacting PDFs or sending separate secure emails, freeing Document Controllers and Package Engineers from manual privacy work on every sensitive RFI.
- **Cut compliance risk and costs**: Prevents accidental NDA breaches and the downstream legal / re-issue 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.

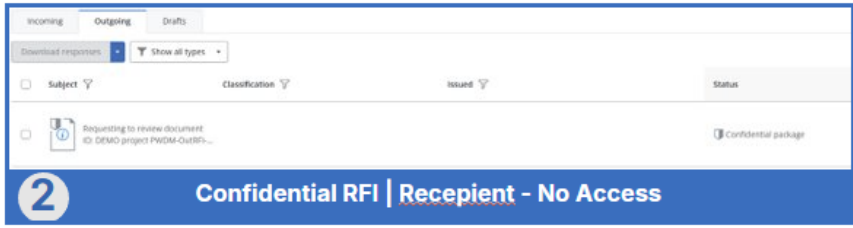
Key capabilities:

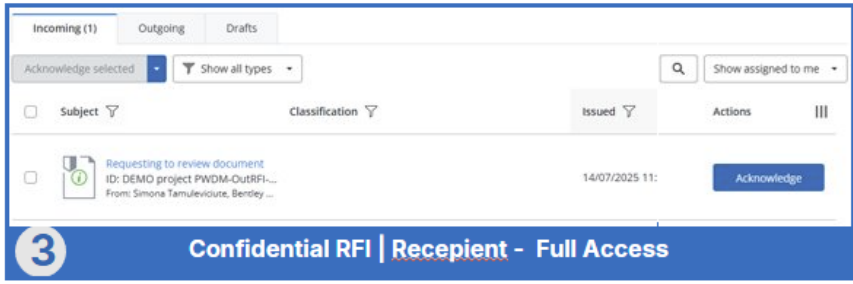
- **Built into the normal "New RFI" flow** – toggle **Confidential Data Included** while creating (or during "Review & Issue") to lock contents for issuer, admin, and named/CC'd recipients only.
- **Reduce noise, keep awareness** – Teams still see that an RFI exists but aren't distracted by content they 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







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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

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Bentley

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.

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