



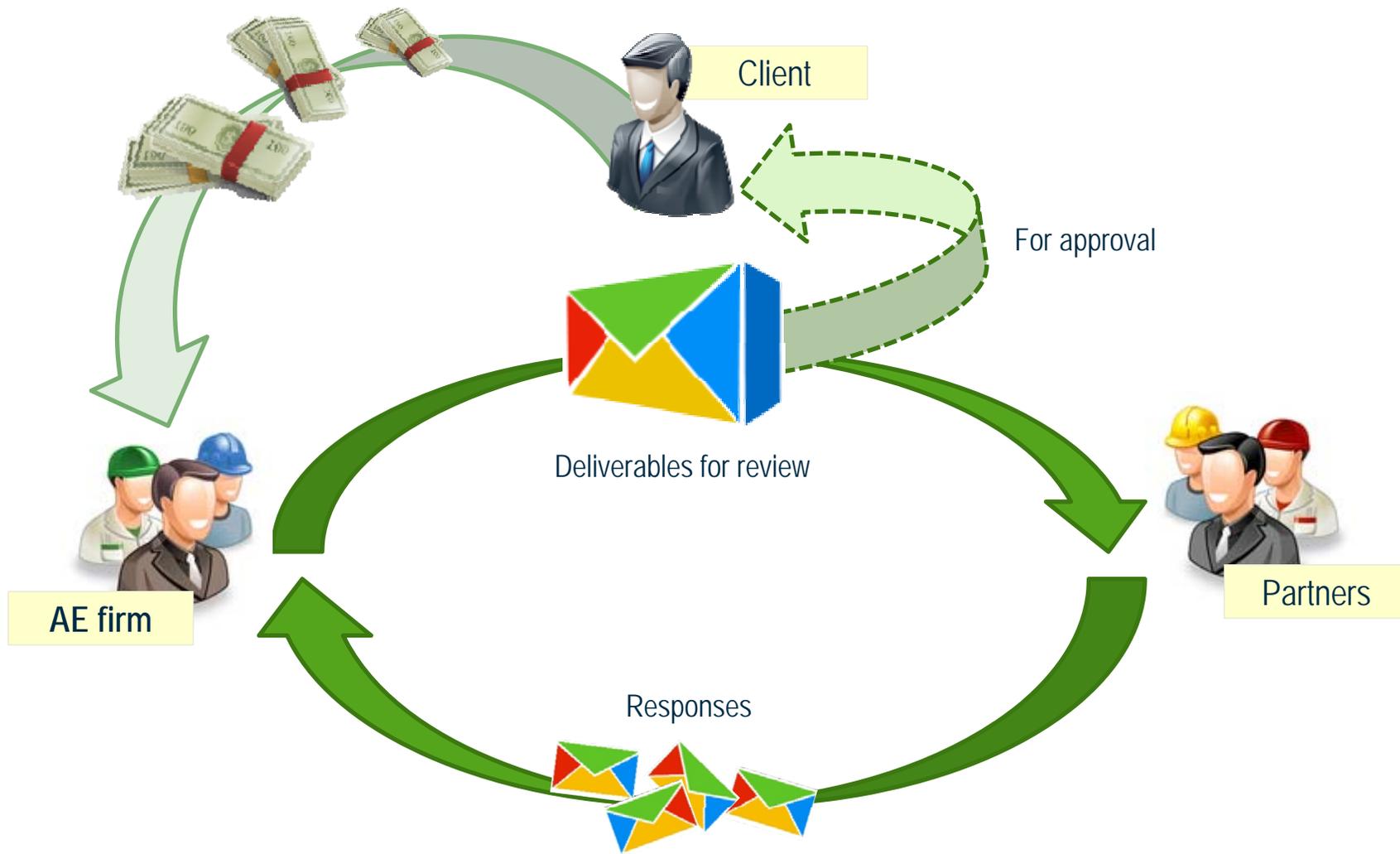
Bentley Transmittal Services for ProjectWise Users

Hans Koorneef, EIM Technical Director EMEA

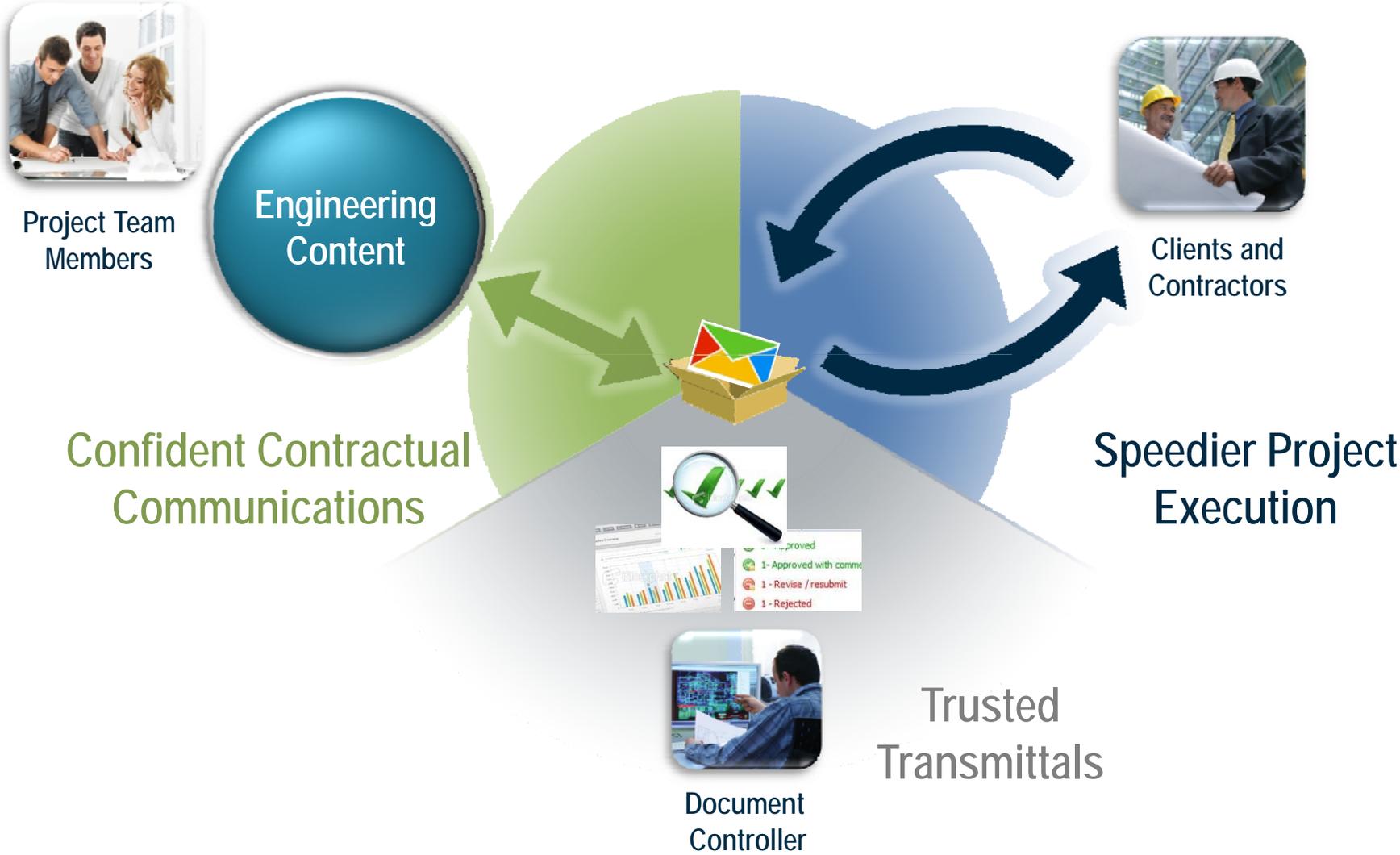
Agenda

- What is a Transmittal?
- Current Transmittals and Submittal Processes
- Existing Market Challenges
- Bentley Transmittal Services
- Summary
- Q&A

What is a Transmittal?



Bentley Transmittal Services Advantages



A Vocabulary

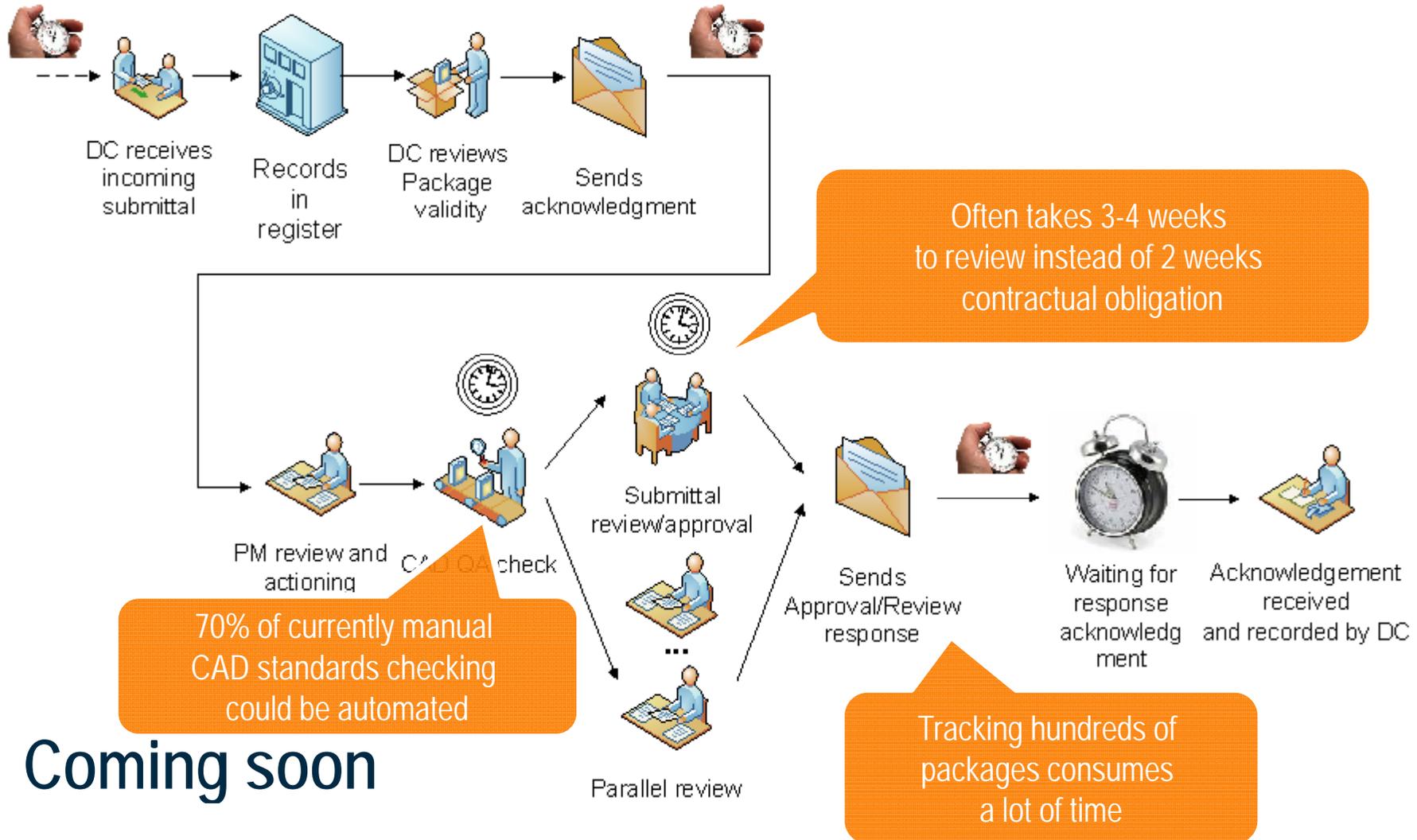
- Transmittal – Data sent outside of organization (outbound)
 - Note - A Transmittal can be a Submission to someone else's system
- Submittal – Data received into organization (inbound)
- Transmittal Letter – Letter describing the contents of a transmission
- Transmittal Content – Documents to be transmitted
- Transmittal Preparation – Gathering together files together with a Transmittal Letter
- Register – A register of what was sent to who when and what action should be taken or is expected.

Current transmittal process (outbound)



Available now

Current submittal process (inbound)

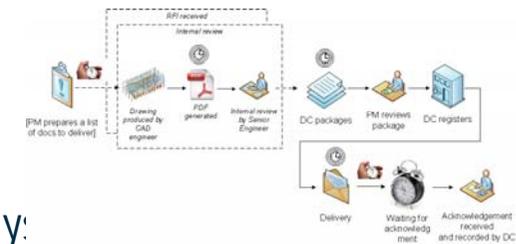


Existing Market Challenges

- Design firms and O/O need to **mitigate risks**
 - Not meeting contractual obligations (content, time)
 - Unable to prove delivery of information
- Execs and PMs lack **visibility** of project status
 - Unable to easily determine status of deliverables and review processes
- Deliverables preparation/delivery & review/comment cycles are **too long and human resource intensive**
 - Current process are time consuming, manual and error prone (create, send, track)
 - Significant document control staff(and others) required to maintain process

Bentley Transmittal Services

- Transmittals Packager module tightly integrated with ProjectWise Explorer client:
 - Create transmittal package within seconds instead of hours
- Externally facing Transmittals delivery web portal
 - Deliver outgoing transmittal package within minutes instead of day:
 - Allow external users uploading responses for you
- Transmittals Register to keep track of all your project deliverables in a single place
 - Mitigate risks by storing all info on what has been send, to whom, when and if/when it was acknowledged and responded
- Transmittals Dashboards to help track project deliverables status





Creating Transmittal from ProjectWise Explorer

ProjectWise Explorer V8i (SELECTSeries)

Datasource Folder Document View Tools Window Help

Address: \\example.com:example-projectname... \Transmittals-management\Transmittals

ID	Subject	Status	Progress	Ack. due date	Response...	Purpose	Issue date
PR004-TM0024	Electric installation drawings	2 days acknowledgement overdue 12 days to respond	Acknowledgements: 8 / 10 Responses: 2 / 10	2011-10-24	2011-11-07	For Review	2011-09-20
PR001TM	Required El. installation drawings	1 day acknowledgement overdue	Acknowledgements: 8 / 10	2011-10-23	2011-10-30	For Information	2011-10-20
PR002TM	Transmittal subject	Acknowledged Responded	Acknowledgements: 8 / 10 Responses: 2 / 10	2011-08-01	2011-08-20	For Approval	2011-07-25
PR001TM	Another Transmittal subject	Acknowledged Responded	Acknowledgements: 8 / 10 Responses: 2 / 10	2011-07-01	2011-07-20	For Approval	2011-06-28

For Help, press F1

11:20 AM

Creating and managing transmittals per ProjectWise project

Creating Transmittal

General tab

Transmittal ID defined by project standards

Transmittal Draft - PR004-TM0024

State: Draft
No acknowledgements and responses yet.

General Recipients Documents Scheduling Audit Trail Responses

Project: **Alignment fixing & design of Tunnel** Transmittal ID: **PR004-TM0024**

Subject:

Purpose:

Comments:

Cover letter template:

Created by Lisa Cuddy on 2011-08-04, 11:02
Last modified by Lisa Cuddy on 2011-08-04, 11:02

Creating Transmittal Recipients

Select from the global list of external participants

Transmittal Draft - PR004-TM0024
State: **Draft**
No acknowledgements and responses yet.

General Recipients Documents Scheduling Audit Trail

Recipients

Recipient	Ack..	Res...	Hard
Erick.Johansson@abc.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	3 CDs
John.Smith@abc.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Martha.Brown@abc.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Marianne.Williamson@xyz.com	<input checked="" type="checkbox"/>	<input type="checkbox"/>	3 CDs
Matthew.Richards@xyz.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Miranda.Kerr@xyz.com	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

Add External Participants

External participants: Show project participants only

User	Company	Name	Position
Dave.Bowman@abc.com	ABC Inc.	Dave Bowman	Engineer
Dwight.McCarthy@abc.com	ABC Inc.	Dwight McCarthy	Engineer
Hugo.Stiglitz@abc.com	ABC Inc.	Hugo Stiglitz	Engineer
Jack.O'Neill@abc.com	ABC Inc.	Jack O'Neill	Engineer
John.Smith@abc.com	ABC Inc.	John Smith	Document Controller
John.Rambo@abc.com	ABC Inc.	John Rambo	Project manager
Martha.Brown@abc.com	ABC Inc.	Martha Brown	Senior Engineer
Robert.Paulson@abc.com	ABC Inc.	Robert Paulson	Engineer

Select Deselect Create external participant

Selected participants:

User	Company	Name	Position
Martha.Brown@abc.com	ABC Inc.	Martha Brown	Senior Engineer
John.Smith@abc.com	ABC Inc.	John Smith	Document Controller

OK Cancel

Add transmittal recipients

Creating Transmittals

Adding documents

Adding documents directly from single source of truth

The screenshot displays the Bentley Transmittal interface. On the left, a sidebar shows a project tree for 'PR004TM' with folders for 'Descr...', 'Notes', and 'Pipeli...'. The 'Attach files' dialog is open, showing a list of documents to be added, including 'B-3d.dgn', 'C-3d.dgn', 'D-3d.dgn', 'E-3d.dgn', 'F-3d.dgn', 'G-3d.dgn', 'H-3d.dgn', 'I-3d.dgn', and 'Y-3d.dan'. The 'D-3d.dgn' file is selected. The main window shows the 'Transmittal Draft - PR004-TM0024' with a 'State: Draft' and 'No acknowledgements and responses yet.' The 'Documents' tab is active, displaying a table of attached documents.

Name	Document nu...	Revision	Status	Description
A1ZIR-pump.pdf	ZIR83940	A1	S4	Pump for high pressure cooling ...
BDx00-turbing.pdf	X0083940	A1	S4	Aenean ipsum mauris, item desc...
BWOT-insulation.pdf	WTZ83940	A1	S4	Etiam ut varius mauris, item des...
C-Pipelines-05468WRT.pdf	C-PP0568	A1	S4	Aenean ipsum mauris, item descr...
DX21-turbing.pdf	D2105879	A1	S4	Turbing for high pressure cooling...
D-3d.dgn	D32485211	A1	S4	Turbine 3D view...

Buttons at the bottom include 'New Folder', 'Add...', 'Remove', 'Save draft', 'Transmit', and 'Close'. A search bar 'Search documents' is also visible.

Reference files are automatically included

Creating Transmittal

Setting schedule and reminders

Transmittal Draft - PR004-TM0024

State: Draft
No acknowledgements and responses yet.

General Recipients Documents Scheduling Audit Trail Responses

Planned issue

Issue date: 2011-11-08

Send reminder: 1 day before issue date

Acknowledgement

Due date: Fixed date: 2011-11-20
 Days after issue: 2 (2011-08-01 for current planned issued date)

Send reminder: 1 day before due date

Response

Due date: Fixed date: 2011-11-30
 Days after issue:

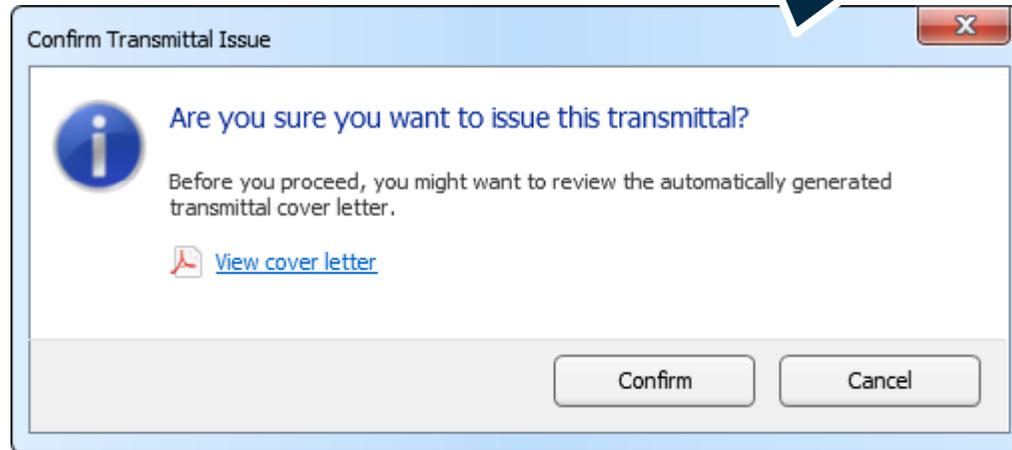
Send reminder: 1 days before due date

Save draft Transmit Close

Automated reminders help issuing data and collecting responses on time

Creating Transmittal *Issue*

Before issuing transmittal,
transmitter can review the cover letter



Automatically generated PDF cover letter

PR004-TM0024 Electric installation drawings for review_JR1.pdf - Adobe Reader

File Edit View Document Tools Window Help

1 / 1 90% Find



Transmittal cover letter

Transmittal number :	PR004-TM0024
Project Number:	PR004
Contract:	PR004-C54-31
Date Issued :	2011.11.08
Purpose Of Issue :	For Review
Due Date :	2011.11.30
Subject:	Electric installation drawin

SENDER ADDRESS & DETAILS	
Sender Code:	AEF-11
Sender name:	Lisa Cuddy
Address:	Svitrigailos, 11h, Vilnius, LT-03228, Lithuania
Phone (1)	+ 370-52398140
Phone (2)	+ 370-52398141
Email	lisa.cuddy@aefirm.com
Company	AEF
Country:	Lithuania

RECIPIENTS

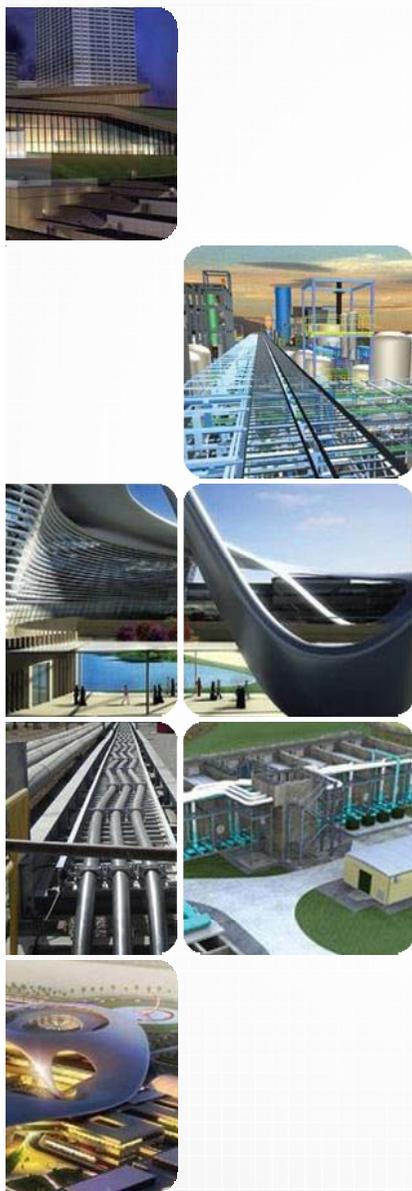
Recipient name	Company	Recipient address	Country	Email	Phone
Eric Johansson	ABC	635 Stockton dr., Exton, PA	USA	eric.johansson@abc.com	+1 610 458 2655
John Smith	ABC	635 Stockton dr., Exton, PA	USA	john.smith@abc.com	+1 610 458 2656
Martha Brown	ABC	635 Stockton dr., Exton, PA	USA	martha.brown@abc.com	+1 610 458 2657
Marianne Williamson	XYZ	Soedra Gubberogatan 20, Gothenburg	Sweden	Marianne.Williamson@xyz.com	+46-31-33 787 20
Matthew Richards	XYZ	Soedra Gubberogatan 20, Gothenburg	Sweden	Matthew.Richards@xyz.com	+46-31-33 787 21
Miranda Kerr	XYZ	Soedra Gubberogatan 20, Gothenburg	Sweden	Miranda.Kerr@xyz.com	+46-31-33 787 22

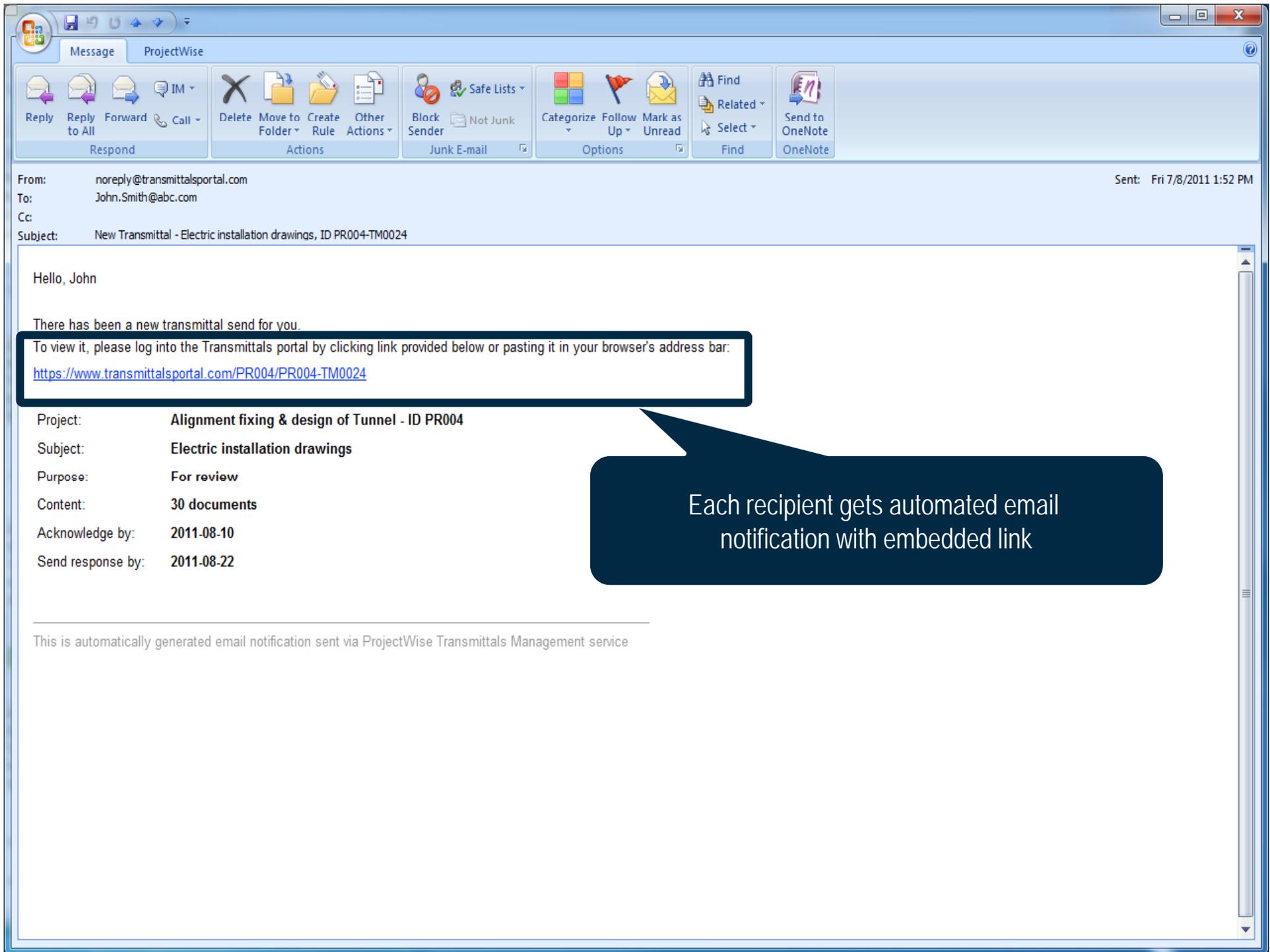
DOCUMENTS

Item no.	Document Title	Document Num	Revision	Status	Description
1	A1ZIR-pump.pdf	ZIR83940	A1	S4	Pump for high preassure cooling system
2	BDX00-turbing.pdf	X0083940	A1	S4	Aenean ipsum mauris, item description
3	BWOT-insulation.pdf	WTZ83940	A1	S4	Etiam ut varius mauris, item description
4	C-Pipelines-05468WRT.pdf	C-PP0568	A1	S4	Aenean ipsum mauris, item description
5	DX21-turbing.pdf	D2105879	A1	S4	Turbing for high pressure cooling system, item description
6	D-3d.dgn	D32485211	A1	S4	Turbine 3D view

16,53 x 23,39 in

Acknowledging, downloading and responding from Transmittals Portal







Transmittals portal

Customizable headline

Email

john.smith@abc.com

Password

.....

Stay signed in

[Forgot your password?](#)

Log in

Secure access to Transmittals Portal



[All projects](#)

[All projects](#) > [Alignment fixing & design of Tunnel](#) > PR004-TM0024



Electric installation drawings - ID PR004-TM0024

State: **Issued**

2 days acknowledgement overdue Due date: 2011-08-10

10 days to final response Due date: 2011-08-22

Acknowledge

Respond



Download

General

Documents

Audit trail

My response

Project: **Alignment fixing & design of Tunnel - ID PR004**

Transmittal ID: **PR004-TM0024**

Subject: Electric installation drawings

Issued by: Lisa Cuddy <lisa.cuddy@bentley.com>

Issue date: 2011-08-06, 15:45

Purpose: For review

Comments: Please review and send your comments.

Cover letter: [Cover-letter-file-name.pdf](#)

Acknowledgement required to download



[All projects](#)

Acknowledgment recorded in the audit trail

[All projects](#) > [Alignment fixing & design of Tunnel](#)

Electric installation drawings - PR004-TM0024

State: **Issued**

✔ You have acknowledged receipt of this Transmittal Due date: 2011-08-10

🕒 10 days to final response Due date: 2011-08-22

Acknowledged

[Respond](#)

[Download](#)

General

[Documents](#)

[Audit trail](#)

[My response](#)

Project: **Alignment fixing & design of Tunnel - ID PR004**

PR004-TM0024

Subject: Electric installation drawings

Issued by: Lisa Cuddy <lisa.cuddy@bentley.com>

Issue date: 2011-08-06, 15:45

Purpose: For review

Comments: Please review and send your comments.

Cover letter: [Cover-letter-file-name.pdf](#)

Download data locally to review



[All projects](#)

[All projects](#) > [Alignment fixing & design of Tunnel](#) > PR004-TM0024



Electric installation drawings - ID PR004-TM0024

State: **Issued**

✓ You have acknowledged receipt of this Transmittal Due date: 2011-08-10

🕒 10 days to final response Due date: 2011-08-22

Acknowledged

Respond



Download

General

Documents

Audit trail

My response

Project: **Alignment fixing & design of Tunnel - ID PR004**

Subject: Electric installation drawings

Issued by: Lisa Cuddy <lisa.cuddy@bentley.com>

Issue date: 2011-08-06, 15:45

Purpose: For review

Comments: Please review and send your comments.

Cover letter: [Cover-letter-file-name.pdf](#)

Transmittal ID: **PR004-TM0024**

Upload review
comments via the Portal

All projects

All projects > Alignment fixing & design of Tunnel > PR004-TM0024

 Electric installation drawings - ID PR004-TM0024

State: **Issued**

 You have acknowledged receipt of this Transmittal Due date: 2011-08-10

 10 days to final response Due date: 2011-08-22

Acknowledged

Respond

Response for each document

General Documents Audit Trail **My response** Total: 30 files in 3 folders, Responded items: 3 of 30. C

- PR004-TM0024
 - Descriptions
 - Notes
 - Pipelines**
 - References

PR004-TM0024 Pipelines

Name	Document number	Revision	Status	Description	My response
<input type="checkbox"/>  A1ZIR-pump.pdf	ZIR83940	A1	S4	Pump for high press...	 Response pending
<input type="checkbox"/>  BDx00-turbine.pdf	X0083940	A1	S4		
<input type="checkbox"/>  BWOT-insulation.pdf	WTZ83940	A1	S4		
<input type="checkbox"/>  C-Pipelines-05468WRT.pdf	C-PP0568	A1	S4		
<input type="checkbox"/>  C-ZIQ-pump.pdf	ZIQ83940	A1	S4		
<input type="checkbox"/>  DX21-turbine.pdf	D2105879	A1	S4		
<input type="checkbox"/>  Pipelines-05468WRT.pdf	PPL05468	A1	S4		

 **WOT23-insulation.pdf**
 Document number: WTZ83942
 Revision: A1
 Status: S4
 Description: Wot insulation purpose is to lorem ipsum d

 **WOT23-insulation.pdf**
 Document number: WTZ03942
 Revision: A1
 Status: S4
 Description: Wot insulation purpose is to lorem ipsum dolor sit am

Response: **Response pending** ▼
 Comment:
 Attachments:

-  Approved
-  Approved with comments
-  Revise / resubmit
-  Rejected
-  Will not respond
-  Response pending

Response: **Response pending** ▼
 Comment:
 Attachments:

-  Approved
-  Approved with comments
-  Revise / resubmit
-  Rejected
-  Will not respond
-  Response pending

Save **Send responses** ▼

User can send a partial response or response to all documents at once

Your response for 26 of 100 documents is ready to be sent

The sent responses will be locked and cannot be edited. If you need to modify your response after it was sent, please contact Lisa Cuddy (lisa.cuddy@bentley.com).

4 documents still remain not responded.

Don't forget to send your final response until 2011-11-30.

Confirm

Cancel



All projects

All projects > Alignment fixing & design of Tunnel > PR004-TM0024

Electric installation drawings - ID PR004-TM0024

State: **Issued**

You have acknowledged receipt of this Transmittal Due date: 2011-08-10

10 days to final response Due date: 2011-08-22

Send responses are locked to allow engineers start addressing the comments

General Documents Audit Trail **My response** Total: 30 files in 3 folders. Responded item: 1-8 of 30.

- PR004-TM0024
 - Descriptions
 - Notes
 - Pipelines**
 - References

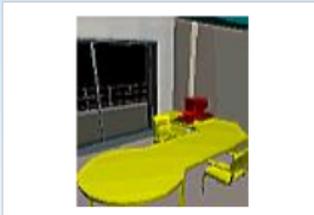
PR004-TM0024 ▶ Pipelines Show all M... approved

Name	Document number	Revision	Status	Description	My response
<input type="checkbox"/> A1ZIR-pump.pdf	ZIR83940	A1	S4	Pump for high press...	Approved - sent, locked
<input type="checkbox"/> BDX00-turbing.pdf	X0083940	A1	S4	Aenean ipsum maur...	Approved - sent, locked
<input type="checkbox"/> BWOT-insulation.pdf	WTZ83940	A1	S4	Etiam ut varius maur...	Revise / resubmit - sent, locked
<input type="checkbox"/> DX21-turbing.pdf	D2105879	A1	S4	Turbing for high pre...	Response pending
<input type="checkbox"/> Pipelines-05468WRT.pdf	PPL05468	A1	S4	Pipelines drawings d...	Response pending

WOT23-insulation.pdf Approved with comments - sent, locked

Document number: WTZ83942
 Revision: A1
 Status: S4
 Description: Wot insulation purpose is to lorem ipsum dolor sit amet - the full item description goes here.

Response: Approved with comments
 Comment: Everything seems to be OK, except one small detail described in the file attached.
 Attachments: Attachment1.overlay.dgn



Response sent on 2011-08-20, 15:40. In need of modifying response, please contact [Lisa Cuddy](#).



Tracking Transmittal status and response from ProjectWise Explorer

Tracking Transmittal Dashboard

The screenshot shows the ProjectWise Explorer V8i (SELECTseries) interface. The main window displays a table of transmittals. The table has columns for ID, Subject, Status, Progress, Ack. due date, Response..., Purpose, and Issue date. The data is as follows:

ID	Subject	Status	Progress	Ack. due date	Response...	Purpose	Issue date
PR004-TM0024	Electric installation drawings	2 days acknowledgement overdue 12 days to respond	Acknowledgements: 8 / 10 Responses: 2 / 10	2011-10-24	2011-11-07	For Review	2011-09-20
PR001TM	Required El. installation drawings	1 day acknowledgement overdue	Acknowledgements: 8 / 10	2011-10-23	2011-10-30	For Information	2011-10-20
PR002TM	Transmittal subject	Acknowledged Responded	Acknowledgements: 8 / 10 Responses: 2 / 10	2011-08-01	2011-08-20	For Approval	2011-07-25
PR001TM	Another Transmittal subject	Acknowledged Responded	Acknowledgements: 8 / 10 Responses: 2 / 10	2011-07-01	2011-07-20	For Approval	2011-06-28

Below the table, a detailed view of the first three transmittals is shown:

- PR004-TM0024** [Electric installation drawings](#): 2 days acknowledgement overdue, 12 days to respond.
- PR001TM** [Required El. installation drawings](#): 1 day acknowledgement overdue.
- PR002TM** [Transmittal subject](#): Acknowledged, Responded.

A callout box in the bottom right corner states: "Transmittals Registry lists the most urgent items at the top".

Tracking Transmittal Dashboard

Transmittal PR004-TM0024

State: Issued

- Acknowledgements: **3 / 6** (3 days acknowledgement overdue)
- Responses: **1 / 3** (12 days to due date)

General Recipients Documents Scheduling Audit Trail Responses

Recipients

Recipient	Acknowl...	Response	Hardcopies	Company	Title	Name	response
Erick.Johansson@abc.com	🔴	🕒	3 CDs to be sent	ABC Inc.	Project manager	Erick Johansson	-
John.Smith@abc.com	🟢	🕒	-	ABC Inc.	Doc. controller	John Smith	View partial response
Martha.Brown@abc.com	🟢	🟢	-	ABC Inc.	Senior Engineer	Martha Brown	View final response
Marianne.Li@xyz.com	🟢	-	-	XYZ Inc.	Project manager	Erick Johansson	-
Matthew.Richards@xyz.com	🔴	-	-	XYZ Inc.	Doc. controller	John Smith	-
Miranda.Kerr@xyz.com	🔴	-	-	XYZ Inc.	Senior Engineer	Martha Brown	-

Partners - for review

Recipient	Acknowl...	Response	Hardcopies
Erick.Johansson@abc.com	🔴	🕒	3 CDs to be sent
John.Smith@abc.com	🟢	🕒	-
Martha.Brown@abc.com	🟢	🟢	-

Withdraw Cancel

Document Controller:
What responses are still pending?

Response in progress

Tracking Transmittal Dashboard

Document Controller:
How many documents are yet to review and respond by John?

Transmittal PR004-TM0024

State: Issued

Acknowledgements: 7 / 9 (3 days acknowledgement overdue)

Responses: 2 / 6 (12 days to due date)

General Recipients Documents Scheduling Audit Trail Responses

Select response to review

Recipient's group: Partners - for approval Recipient: John.Smith@abc.com

Response overview: Acknowledged on: 2011-08-23, 3:30 PM Responded: 10 / 30 documents Latest response received: 2011-08-30, 1:42 PM

Name	Document n...	Revision	Status	Description	Response	Attachments
A1ZIR-pump.pdf	ZIR83940	A1	S4	Pump for high pressure cooling ...	Approved with comments	1
BDX00-turbing.pdf	X0083940	A1	S4	Aenean ipsum mauis, item desc...	Approved	
BWOT-insulation.pdf	WTZ83940	A1	S4	Pump for high presris, item des...	Revise / resubmit	3
C-Pipelines-05468WRT.pdf	C-PP0568	A1	S4	Aenean ipsum mauris, item descr...	Revise / resubmit	3
DX21-turbing.pdf	D2105879	A1	S4	Pump for high pressure cooling ...	Approved with comments	2
D-3d.dgn	D32485211	A1	S4	Turbine 3D view...	Approved	

Responses attachments

All attached files are downloaded to ProjectWise.

Incoming Response Attachments Storage Location:

pw:\winvm2k8rv.bentley.com:PWIS_SS4\Documents\BSI300 - Medical Complex-Córdoba\Transmittal Files\Responses\

Recall Close

Tracking Transmittal

Related transmittals

The screenshot shows the ProjectWise Explorer V8i (SELECTseries) interface. The left pane displays a tree view of the project structure, including folders for 'Project name', 'Alignment fixing & design of Tunnel', 'Project WTP documents', 'Discipline 1', 'Discipline 2', 'references', 'Submittals', 'Responses', and 'Transmittals Management'. The right pane shows a list of files with columns for Name, Description, and File Name. The file 'DX21turbing.dgn' is selected. Below the file list, the 'Responses' tab is active, displaying a table of responses to the selected drawing.

CAD Designer:
What comments were received for my specific drawing?

Response to transmittal	Recipient	Response	Comment	Attachments	Date received
PR004-TM0024	Erick.Johansson@abc.com	Approved w/ comments	Some free text comment. Can...	drawingname.overlay.dgn	2011-06-30, 15:45

ID	Subject	Date issued
PR004-TM0024	Electric installation drawings	2011-06-30, 15:45
PR004-TM0024	Transmittal of Interim Guidance on Financial Responsibility for Facilities Subject to corrective Action	2011-06-20, 18:40



Transmittals settings

Settings

General

Manage project specific transmittal standards

Transmittals Management Settings

General | Numbering rules | Participants and permissions | Notifications | Purposes | Documents' attributes | Data storage

Transmittals management for "Alignment fixing & design of tunnel"

Enabled
When enabled, responsible project participants are able to create, transmit and track the progress of the transmitted document packages.

Disabled
When disabled, responsible project participants are not able to create and transmit document packages. Previous transmittals, if any, still will be available for reviewing.

OK Cancel Apply

Settings

Numbering rules

The screenshot shows a software dialog box titled "Transmittals Management Settings" with a close button (X) in the top right corner. The "Numbering rules" tab is selected, showing a text area with the following text: "Numbering rules are used to generate transmittals / submittals ID. Each ID consists of fixed prefix and autoincremental number. These rules are applied to all the packages sent or received under current project." Below this text are two input fields: "Transmittal prefix:" with the value "PRTM-" and a small example "E.g. TR" to its right, and "Number of ID digits:" with the value "5". To the right of these fields is a "Preview" box containing the generated ID "PRTM-00001". At the bottom of the dialog are three buttons: "OK", "Cancel", and "Apply".

Define project specific
transmittal ID generation rules

Settings

Participants and permissions

Provisioning rights for project participants

Transmittals Management Settings

General | Numbering rules | **Participants and permissions** | Notifications | Purposes | Documents' attributes | Data storage

ProjectWise project participants

Internal users	Role	Publish tran
James Hurley	Project administrator	<input checked="" type="checkbox"/>
Lisa Cuddy	Project leader	<input checked="" type="checkbox"/>
Gregory House	Team member	<input checked="" type="checkbox"/>
Sarah Palmer, Mike Wazowski, Joe Helfstrom, Adnrew McDowel, Linda Spacey, Mariann Li	Team member	<input type="checkbox"/>
Mike Wazowski		<input checked="" type="checkbox"/>
Joe Helfstrom		<input checked="" type="checkbox"/>
Andrew McDowel		<input checked="" type="checkbox"/>

Manage roles Add... Remove

External project participants

External project participants are able to access Transmittals only via portal.

External users	Company	Title	Receive transmittal
John Smith	ABC Inc.	Document controller	<input checked="" type="checkbox"/>
Martha Brown	ABC Inc.	Senior engineer	<input checked="" type="checkbox"/>

Add... Remove

OK Cancel Apply

Settings

Notifications

Customize email notifications

The screenshot shows the 'Transmittals Management Settings' dialog box with the 'Notifications' tab selected. The dialog has several tabs: 'General', 'Numbering rules', 'Participants and permissions', 'Notifications', 'Purposes', 'Documents' attributes', and 'Data storage'. The 'Notifications' tab contains the following fields:

- Select notification:** A dropdown menu with 'New submittal received' selected. Below it is a placeholder text: '[Notification purpose explanation here]'.
Subject: A text box containing 'New submittal - {Object name}, {id}'.
- Letter text:** A large text area containing:
Hello, {User name}
You have new incoming submittal for review.
To view it in ProjectWise Explorer, please click the link provided below:
[{Object name}](#)
- Footer:** A text box containing 'This is automatically generated email notification sent via ProjectWise Transmittals service'.

At the bottom right of the dialog are three buttons: 'OK', 'Cancel', and 'Apply'. A small '...' icon is located at the bottom right corner of the dialog frame.

Settings

Notification types

External user notifications:

- Access granted to project portal
- Password recovery
- New transmittal received
- Acknowledgement due
- Acknowledgement overdue
- Response due
- Response overdue
- Transmittal recall

Internal user notifications:

- Planned issue due
- Planned issue overdue
- Acknowledgement overdue
- Response overdue
- Transmittal received for review
- Transmittal sent for review was issued
- Transmittal sent for review was rejected
- Responses received
- Responses received all
- Transmittal issuing/sending failed

Settings

Purposes

Transmittals Management Settings

General | Numbering rules | Participants and permissions | Notifications | Purposes | Documents' attributes | Data storage

Double-click the purpose to modify its name or according response types.

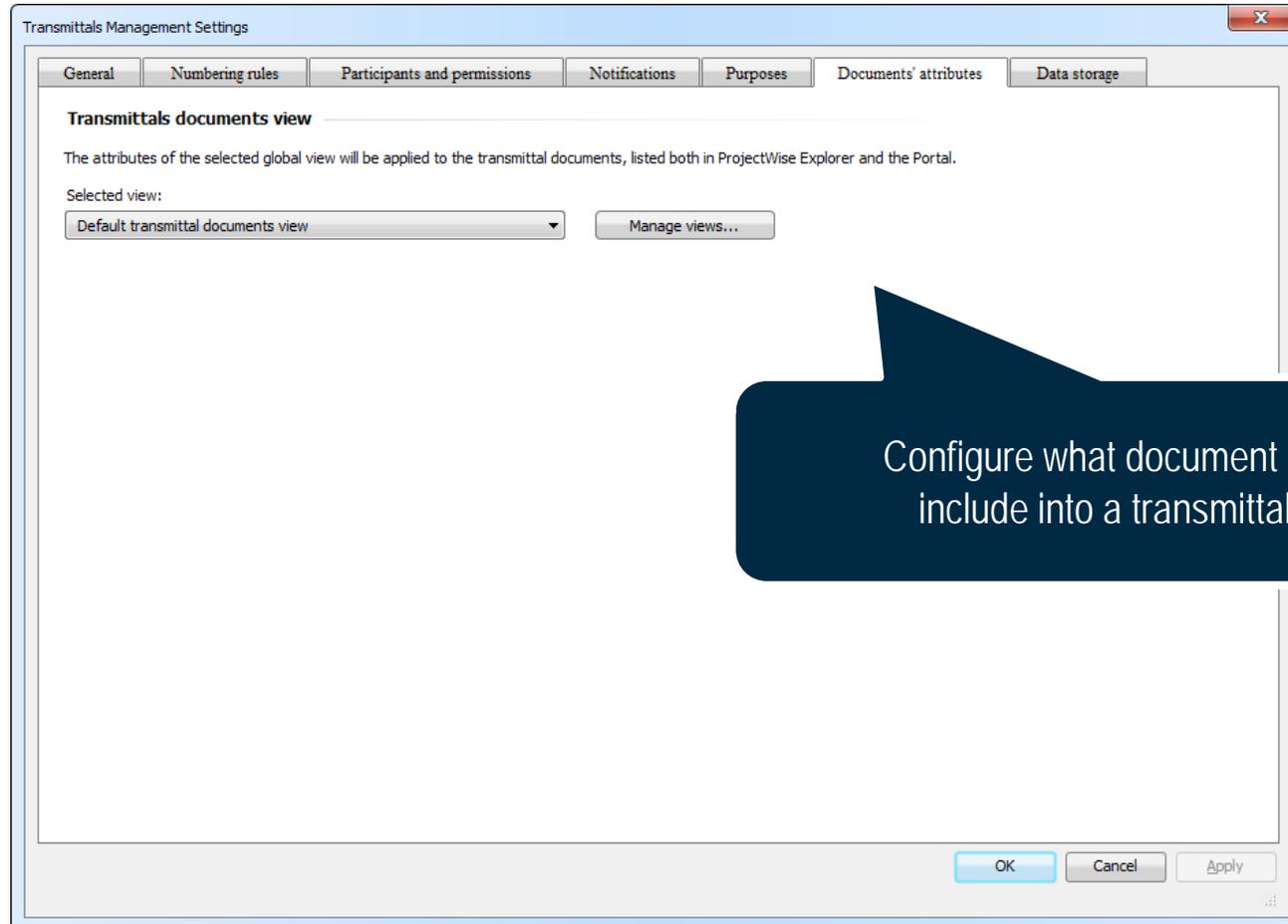
Purposes	Acknowledge	Response	Response types
For Review	YES	YES	Approved, Approved with comments, Rejected, Revise/resubmit...
For Approval	YES	YES	Approved, Rejected, Will not respond
For Information	YES	NO	Response is not expected. Optional commenting allowed only.
For Estimation	YES	NO	Response is not expected. Optional commenting allowed only.
For Design	YES	NO	Response is not expected. Optional commenting allowed only.
For Construction	YES	NO	Response is not expected. Optional commenting allowed only.

Control the way participants can respond to a transmittal package

OK Cancel Apply

Settings

Document metadata to send



Configure what document attributes to include into a transmittal package

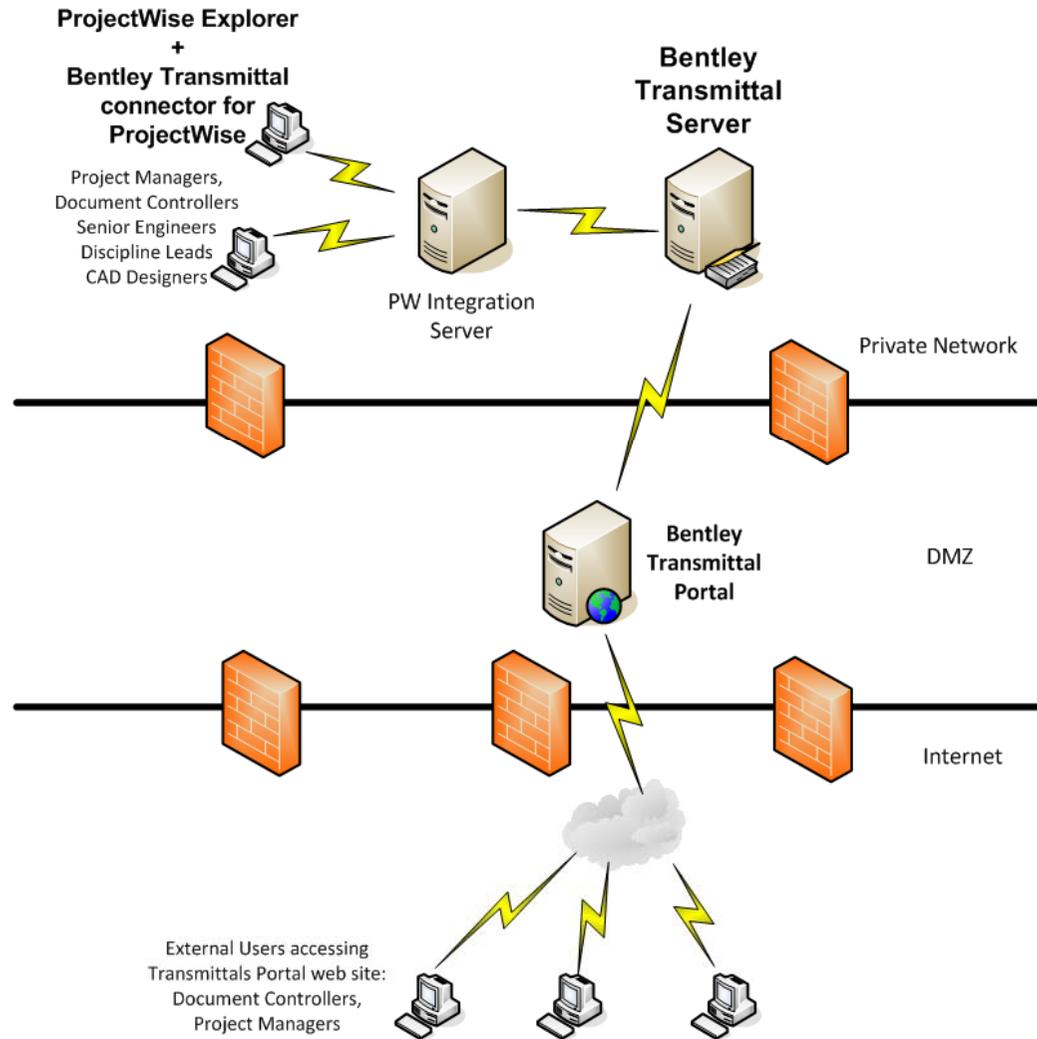
Settings

Data storage

Define where markups will be stored

The screenshot shows the 'Transmittals Management Settings' dialog box with the 'Incoming data storage' tab selected. The 'Transmittals' section is active, showing a text field for 'Store incoming response attachments:' with the path 'pw:\\datasource.ABC.com\\Documents\\ProjectABC\\Transmittals\\Responses' and a 'Select' button. Below this is a checkbox for 'Create subfolder(s) in the folder selected'. Underneath, there is a section 'Select the attributes you want to include in the subfolder name:' with four radio button options: 'Transmittal ID' (selected), 'Transmittal ID\\Company name', 'Company name\\Transmittal ID', and 'Company name'. To the right of these options is an 'Example' box containing the path: 'pw:\\datasource.ABC.com\\Documents\\ProjectABC\\Transmittals\\Responses\\PRTM-00001\\'. At the bottom of the dialog are 'OK', 'Cancel', and 'Apply' buttons.

Deployment architecture





Summary

Summary

- Bentley Transmittal Services V1.0 :
 - Create transmittal package within seconds instead of hours
 - Deliver outgoing transmittal packages within minutes instead of days
 - Mitigate risks by storing all info on what has been send, to whom, when and if/when it was acknowledged and responded
 - Keep track of project deliverables status and progress
- Bentley Transmittals solution works with ProjectWise (and later with eB)

