

ProjectWise Deliverables Management

An Overview

ProjectWise Deliverables Management

- Provides secure deliverables exchange between business entities
 - 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 a web portal
 - Makes the deliverables review process easy to track through email notifications and the built-in audit trail.

ProjectWise Deliverables Management Interfaces

- ProjectWise Deliverables Management portal
 - Accessible from a web browser and does not need any additional software installed in order to use it. DOES REQUIRE an administrator to register a CONNECTED project and turn on ProjectWise Deliverables Management in that project
 - The same portal can be accessed from with ProjectWise Explorer through the Project Portal tab in the Preview Pane. This is available only when you select a ProjectWise project that is associated with a CONNECTED project
- ProjectWise Deliverables Management Connector for ProjectWise Explorer
 - A plug-in that is installed on top of ProjectWise Explorer. Installing the connector adds a Deliverables Management node within any ProjectWise project that is associated to a CONNECTED project that has ProjectWise Deliverables Management turned on

So...what is a deliverable?

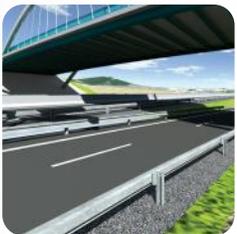
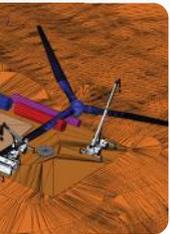
- Deliverables are of 3 types
 - Transmittal – OUTGOING – something you transmit OUTSIDE a project for the purpose of review, mark-up etc.
 - Submittal – INCOMING – data received into your organization
 - RFI – INCOMING or OUTGOING – Request for information
- May or may not have attachments
 - If attachments needs to come from inside of ProjectWise, then the transmittal or RFI must be generated inside of ProjectWise Explorer, otherwise attachments can only be local copies of files
- Have Cover Letters

Creating a Field Investigation Package – Working with RFIs

- Creating an outgoing RFI
 - The Deliverables Management console
 - Creating a new RFI
 - Attaching ProjectWise document(s)
 - Setting acknowledgment and response schedules/dates

Responding to an RFI

- Responding to an RFI
 - Responding to the email notification
 - Accessing the RFI
 - Acknowledging receipt of the RFI
 - Responding to an RFI
 - Marking up an i-model and creating Punch List Items
- Reviewing results of closing the deliverables loop



Thank you