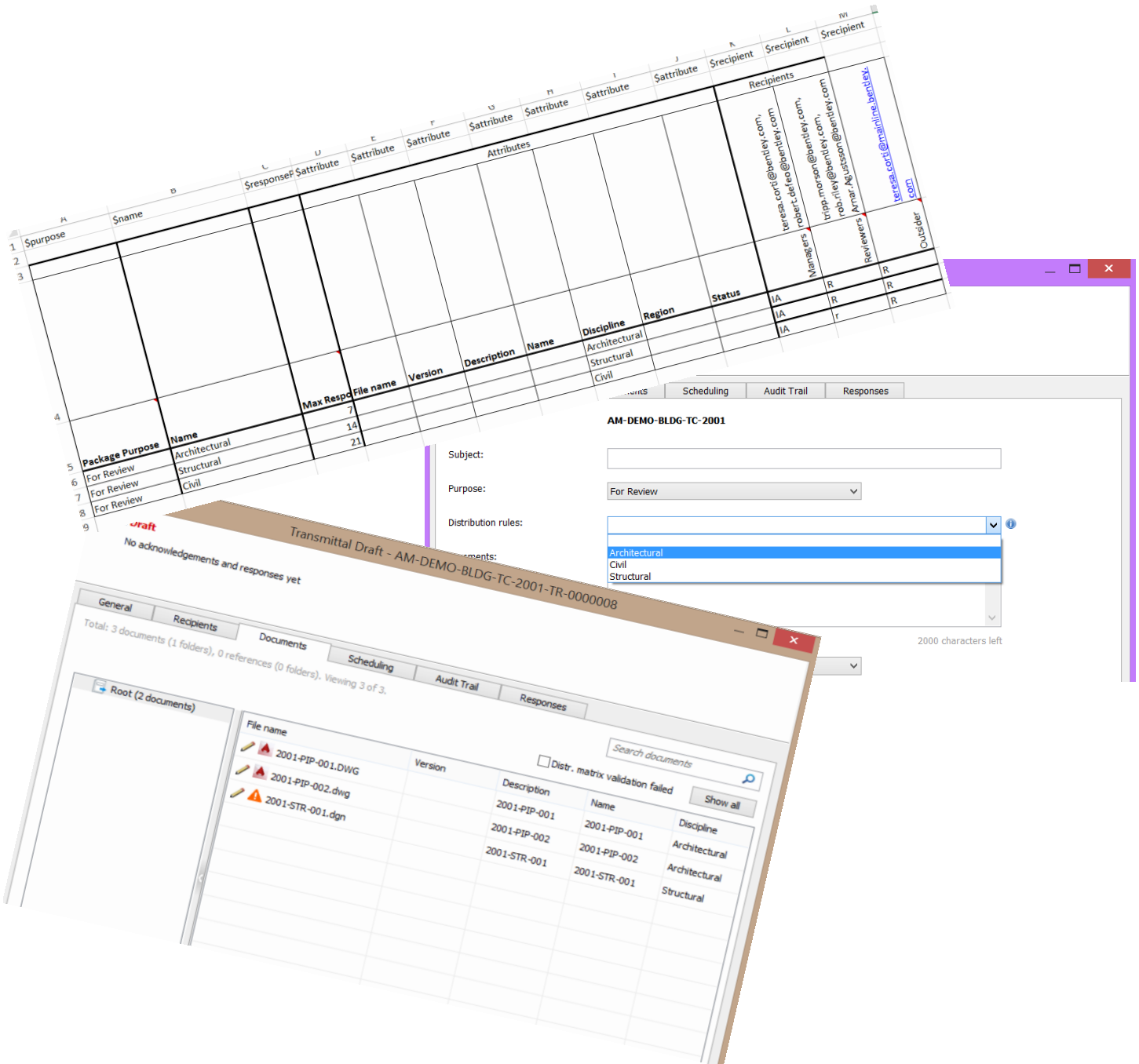


# ProjectWise Deliverables Management

## Document Distribution Matrix



The screenshot displays the Bentley ProjectWise Deliverables Management interface. It features a Document Distribution Matrix, a document details form, and a document list.

**Document Distribution Matrix:**

| Package Purpose | Name          | Max Respd | File name | Version | Description | Name | Discipline    | Region | Status | Recipients   |
|-----------------|---------------|-----------|-----------|---------|-------------|------|---------------|--------|--------|--|
| For Review      | Architectural | 7         |           |         |             |      | Architectural |        | IA     | teresa.cort@bentley.com, robert.deleo@bentley.com                                |
| For Review      | Structural    | 14        |           |         |             |      | Structural    |        | IA     | tripp.morison@bentley.com, robert.deleo@bentley.com                              |
| For Review      | Civil         | 21        |           |         |             |      | Civil         |        | IA     | tripp.morison@bentley.com, robert.deleo@bentley.com, jamar.ajustison@bentley.com |

**Document Details Form (AM-DEMO-BLDG-TC-2001):**

Subject:

Purpose:

Distribution rules:

Comments:

**Document List (AM-DEMO-BLDG-TC-2001-TR-0000008):**

| File name        | Version | Description  | Name         | Discipline    |
|------------------|---------|--------------|--------------|---------------|
| 2001-PIP-001.DWG |         | 2001-PIP-001 | 2001-PIP-001 | Architectural |
| 2001-PIP-002.dwg |         | 2001-PIP-002 | 2001-PIP-002 | Architectural |
| 2001-STR-001.dgn |         | 2001-STR-001 | 2001-STR-001 | Structural    |

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## Overview

Deliverables Management's Document Distribution Matrix (DDM) will allow project teams to define and enforce access control based standardizations, helping to ensure that documents of a specific type are always reviewed by specific people. This capability allows administrators to manage project deliverables distribution more accurately, effectively and in a fully auditable way. - all this will help better manage risk and save a lot of time for our users' project teams.

In summary, with DDM you can define that "For review" documents (or some other purpose as per DDM configuration) are always sent to specific people, and only documents of a specific type (with specific attribute values) could be added to such package; in addition to defining the maximum response period for specific document type.

If DDM is configured for a project, during the transmittal package creation users will be able to select specific DDM entry. The system will automatically populate recipients, set maximum response periods and validate documents that are added to the package.

## Notes

- If Document Distribution Matrix (DDM) is not configured in the CONNECTED Project, nothing will show in PW explorer interface for DM.
- DDM settings are in the CONNECTED Project DM – Settings
- Only users with DM Administrator permissions will be able to modify this.

## Template

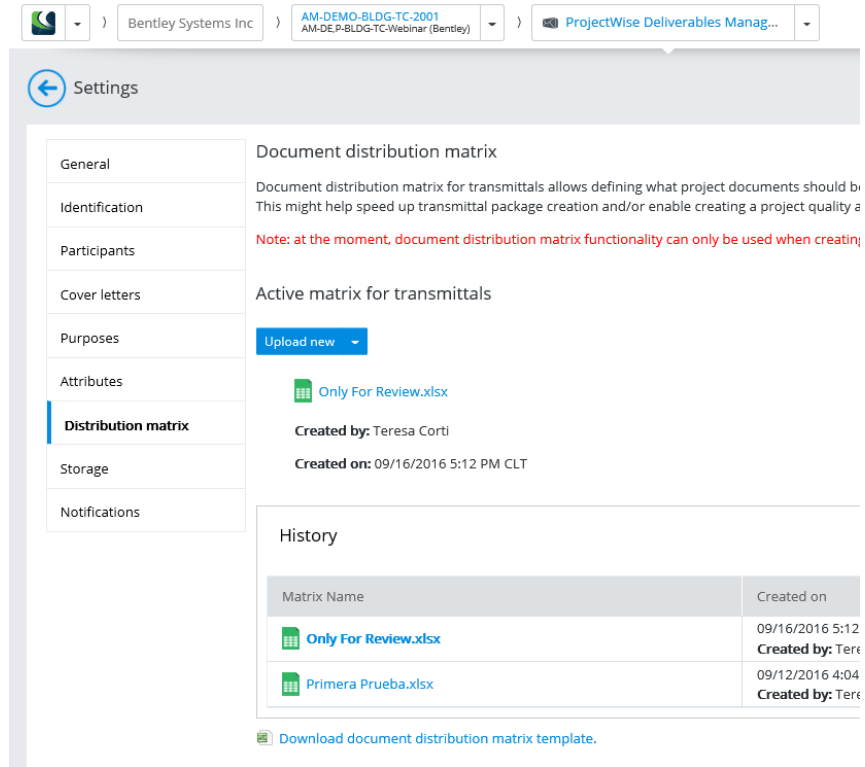
The idea of the template is to have as much information about a Transmittal as possible.

As soon as participants or attributes are added, they will be reflected in the template when it is downloaded.

The template cannot be modified via the Web.

## How does it work

In **Deliverables Management – Settings** there's a new option: **Distribution Matrix**.



The screenshot shows the 'Settings' page for 'Distribution matrix' in Bentley Deliverables Management. The breadcrumb trail is: Bentley Systems Inc > AM-DEMO-BLDG-TC-2001 AM-DEP-BLDG-TC-Webinar (Bentley) > ProjectWise Deliverables Manag... > Settings.

The left sidebar contains the following menu items: General, Identification, Participants, Cover letters, Purposes, Attributes, **Distribution matrix** (selected), Storage, and Notifications.

The main content area is titled 'Document distribution matrix'. It includes the following text:
 

- Document distribution matrix for transmittals allows defining what project documents should be included in a transmittal package creation and/or enable creating a project quality assurance plan.
- Note: at the moment, document distribution matrix functionality can only be used when creating a transmittal.

Below this text is the section 'Active matrix for transmittals', which features an 'Upload new' button and a list of matrices:
 

- Only For Review.xlsx**: Created by: Teresa Corti, Created on: 09/16/2016 5:12 PM CLT

The 'History' section contains a table with the following data:

| Matrix Name                 | Created on                                     |
|-----------------------------|--|
| <b>Only For Review.xlsx</b> | 09/16/2016 5:12 PM<br>Created by: Teresa Corti |
| <b>Primera Prueba.xlsx</b>  | 09/12/2016 4:04 PM<br>Created by: Teresa Corti |

At the bottom of the page, there is a link: [Download document distribution matrix template.](#)

The Document Distribution Matrix contains the following settings defined in Deliverables Management:

- Purposes
- Attributes
- Participants (Internals and Externals)

## 1. Download Document Distribution Matrix template

The Document Distribution Matrix has 5 sections:

### 1.1. Package Purpose

| Package Purpose  |
|------------------|
| For Review       |
| For Approval     |
| For Information  |
| For Construction |
| For Design       |
| For Estimation   |

You can add as many Package Purposes as necessary.

Ex:

- For Review – Architectural
- For Review – Civil
- For Review – Mechanical

### 1.2. Name

| Name   |
|--------|
| Name-1 |
| Name-2 |
| Name-3 |
| Name-4 |
| Name-5 |
| Name-6 |

We will give a name to each Package Purpose.

Ex:

- Architectural
- Civil
- Mechanical

### 1.3. Max Response Period (Calendar days)

| Max Response Pe |
|-----------------|
| 14              |
| 14              |
| 14              |
| 14              |
| 14              |
| 14              |

Each Package Purpose can have its own Max Response Period

Ex:

- 7 (days)
- 14 (days)
- 21 (days)

#### 1.4. Attributes

| File name | Version | Description | Name | Discipline | Region | Status |
|-----------|---------|-------------|------|------------|--------|--------|
|           |         |             |      |            |        |        |
|           |         |             |      |            |        |        |
|           |         |             |      |            |        |        |
|           |         |             |      |            |        |        |
|           |         |             |      |            |        |        |

The attributes are defined manually in Deliverables Management Portal – Settings – Attributes or they can be defined in ProjectWise as a View for attributes to be sent with the documents in Deliverables Management (PW) – Settings – Document’s Attributes.

The attributes in the Template are also used to validate the documents sent in a Transmittal. You can add as many attributes to validate as needed.

Ex:

- For the Package Purpose: **For Review – Architectural** we want to be sure that only the files that have the attribute **Discipline = Architectural** are sent, so in Discipline we will add **Architectural**

#### 1.5. Recipient

| Recipients  |  |                           |                           |                           |                           |  |
|---|--|---------------------------|---------------------------|---------------------------|---------------------------|--|
| teresa.corti@bentley.com,<br>robert.defeo@bentley.com,<br>rob.riley@bentley.com | tripp.morson@bentley.com,<br>teresa.corti@mainline.bentley.com,<br>company_user5@company.com | company_user6@company.com | company_user7@company.com | company_user8@company.com | company_user9@company.com |  |
| Role1   | Role2  | Role3                     | Role4                     | Role5                     | Role6                     |  |
| I   | IA   | IA                        | IA                        |                           |                           |  |
| IA  | I  | I                         | I                         | IA                        | IA                        |  |
| I   | I  | I                         | I                         | I                         |                           |  |
| I   |  |                           | I                         | I                         | I                         |  |
| I   |  | I                         |                           | I                         | I                         |  |
| I   |  | I                         |                           | I                         | I                         |  |

The recipients are the participants for Deliverables Management in this project. You cannot add new participants to the Document Distribution Matrix

You can change the **Role Name**

The actions that are expected for each participant are:

- **I**: Information without Acknowledge
- **IA**: Information with Acknowledge
- **R**: Response

**Example of Document Distribution Matrix**

**Note:** You can have as many Purposes as you want -possibly hundreds

| 1 | \$purpose       | \$name        | \$responseP | \$attribute | \$attribute | \$attribute | \$attribute | \$attribute   | \$attribute | \$attribute | \$recipient   | \$recipient  | \$recipient  |
|---|-----------------|---------------|-------------|-------------|-------------|-------------|-------------|---------------|-------------|-------------|---|--|--|
| 2 |                 |               |             |             |             |             |             |               |             |             |   |  |  |
| 3 |                 |               |             | Attributes  |             |             |             |               |             | Recipients  |   |  |  |
| 4 |                 |               |             |             |             |             |             |               |             |             | teresa.corti@bentley.com,<br>robert.defeo@bentley.com | tripp.morson@bentley.com,<br>rob.riley@bentley.com | <a href="mailto:teresa.corti@mainline.bentley.com">teresa.corti@mainline.bentley.com</a> |
| 5 | Package Purpose | Name          | Max Respo   | File name   | Version     | Description | Name        | Discipline    | Region      | Status      | Managers  | Reviewers  | Outsider   |
| 6 | For Review      | Architectural | 7           |             |             |             |             | Architectural |             |             | I   | IA   | R  |
| 7 | For Review      | Structural    | 14          |             |             |             |             | Structural    |             |             |   |  |  |
| 8 | For Review      | Civil         | 21          |             |             |             |             | Civil         |             |             |   |  |  |



## 2. Upload new Document Distribution Matrix

Once you modify the Document Distribution Matrix, it needs to be uploaded it to the Deliverables Management Portal.

Bentley Systems Inc > AM-DEMO-BLDG-TC-2001 > AM-DEP-BLDG-TC-Webinar (Bentley) > ProjectWise Deliverables Manag...

Settings

General | Identification | Participants | Cover letters | Purposes | Attributes | **Distribution matrix** | Storage | Notifications


**Document distribution matrix**

Document distribution matrix for transmittals allows defining what project documents should be sent. This might help speed up transmittal package creation and/or enable creating a project quality assurance.

*Note: at the moment, document distribution matrix functionality can only be used when creating transmittals.*

Active matrix for transmittals



**Upload new** ▾


 Only For Review.xlsx

**Created by:** Teresa Corti

**Created on:** 09/16/2016 5:12 PM CLT

**History**

| Matrix Name  | Created on  |
|--|---|
|  Only For Review.xlsx | 09/16/2016 5:12 PM CLT<br><b>Created by:</b> Teresa Corti |
|  Primera Prueba.xlsx  | 09/12/2016 4:04 PM CLT<br><b>Created by:</b> Teresa Corti |

 [Download document distribution matrix template.](#)

If something is invalid in the Excel file, as the the DDM is uploaded, it will be go through the validation process. You will be presented with a Validation Failed dialogue box which includes correction recommendations.

**Validation failed** ✕

There are missing items in the current project settings.

You still can proceed with current Excel spreadsheet, but you will have to add missing items to the project settings before applying this distribution matrix to a transmittal draft.

**Missing items:**

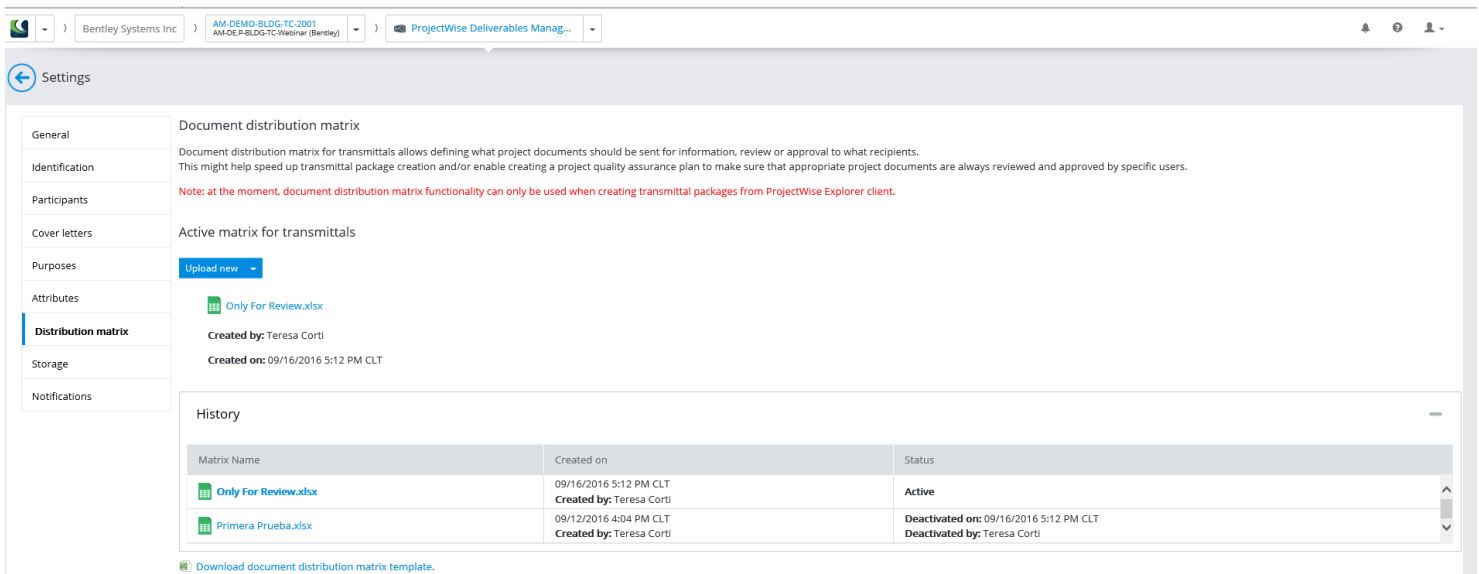
**Project participants (1):**  
teresa.corti@gmail.com

Proceed anyway
Cancel

In this example I added a participant that is not in the list of DM participants.

We can proceed anyway and upload the DDM and fix the error or Cancel the operation, fix the error and reload the DDM.

Document Distribution Matrix keeps a history of all DDMs uploaded and which is the Active one.



The screenshot shows the 'Settings' page for 'Document distribution matrix'. The left sidebar includes 'General', 'Identification', 'Participants', 'Cover letters', 'Purposes', 'Attributes', 'Distribution matrix', 'Storage', and 'Notifications'. The main content area shows the 'Active matrix for transmittals' section with an 'Upload new' button and a list of matrices. Below this is a 'History' table.

| Matrix Name          | Created on   | Status   |
|----------------------|--|--|
| Only For Review.xlsx | 09/16/2016 5:12 PM CLT<br>Created by: Teresa Corti | Active   |
| Primera Prueba.xlsx  | 09/12/2016 4:04 PM CLT<br>Created by: Teresa Corti | Deactivated on: 09/16/2016 5:12 PM CLT<br>Deactivated by: Teresa Corti |

[Download document distribution matrix template.](#)

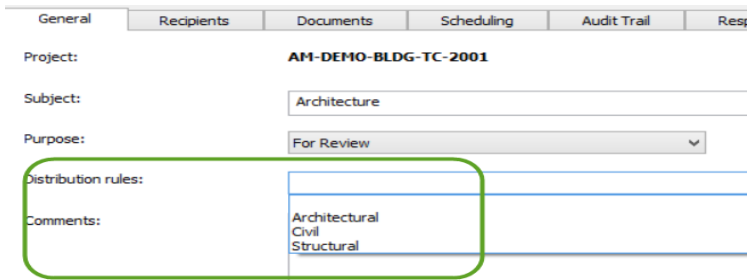
### 3. Use Document Distribution Matrix

**Note:** To use DDM in ProjectWise Explorer **you need:** ProjectWise Deliverables Management connector for ProjectWise Explorer – **10.00.2.60**. This is **still in build**.

#### 3.1. In ProjectWise Explorer create a New Transmittal

##### 3.1.1. In the **General Tab** you will see that Distribution Rules were added.

- Select a Purpose.
  - For Review
- Select the Distribution Rules
  - The list of Names you defined in the Document Distribution Matrix for the Purpose Review will be visible.
  - Example: **Architectural**



General Recipients Documents Scheduling Audit Trail Resp

Project: **AM-DEMO-BLDG-TC-2001**

Subject: Architecture

Purpose: For Review

Distribution rules: Architectural, Civil, Structural

|   |                        |               |          |
|---|------------------------|---------------|----------|
| 4 |                        |               |          |
| 5 | <b>Package Purpose</b> | <b>Name</b>   | <b>N</b> |
| 6 | For Review             | Architectural |          |
| 7 | For Review             | Structural    |          |
| 8 | For Review             | Civil         |          |

##### 3.1.2. Go to **Recipients**

You will see that the recipients are automatically added and locked. These are the participants that were add in Document Distribution Matrix.

The actions for each recipient are those defined in the Excel file.

If desired, you can add more recipients.

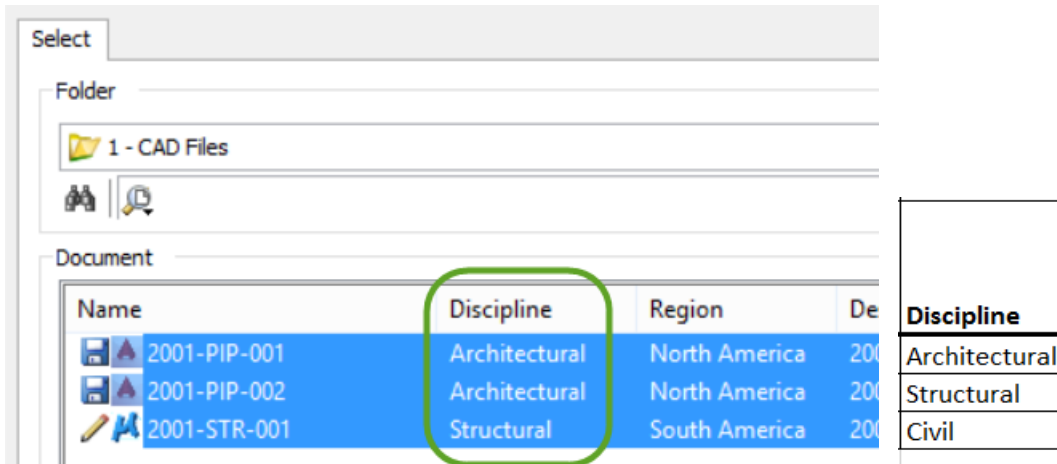
| Recipient                       | Ack                                 | Resp                                |
|---------------------------------|-------------------------------------|-------------------------------------|
| teresa.corti@bentley.com        | <input type="checkbox"/>            | <input type="checkbox"/>            |
| robert.defeo@bentley.com        | <input type="checkbox"/>            | <input type="checkbox"/>            |
| tripp.morson@bentley.com        | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| rob.riley@bentley.com           | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| teresa.corti@mainline.bentle... | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

| Recipients  |  |                                       |
|---|--|---------------------------------------|
| teresa.corti@bentley.com,<br>robert.defeo@bentley.com | tripp.morson@bentley.com,<br>rob.riley@bentley.com | teresa.corti@mainline.bentl<br>ey.com |
| Managers  | Reviewers  | Outsider                              |
| I   | IA   | R                                     |

### 3.1.3. Go to Documents - Add

- Select the documents you want to add to the Transmittal.

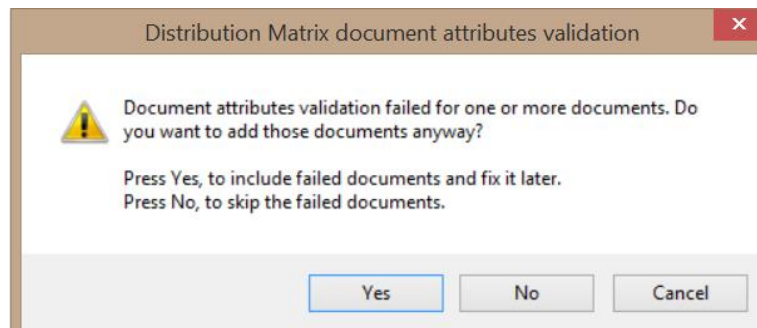
Keep in mind the Attribute(s) you have defined in your Document Distribution Matrix to validate against the attribute(s) in ProjectWise Document.



Example: Purpose: **For Review – Architectural** the documents will have Architectural as the Discipline

| Package Purpose | Name          | Max Respo | File name | Version | Description | Name | Discipline    |
|-----------------|---------------|-----------|-----------|---------|-------------|------|---------------|
| For Review      | Architectural | 7         |           |         |             |      | Architectural |
| For Review      | Structural    | 14        |           |         |             |      | Structural    |
| For Review      | Civil         | 21        |           |         |             |      | Civil         |

- Add the selected documents. Document Distribution Matrix will validate that all the selected documents have Architectural in Discipline.
- If a document doesn't meet the criteria it will show an error. You can choose to **Skip** the failed documents by pressing **No**, or **include** the failed documents and fix them later by pressing **Yes**.



Document Distribution Matrix will show the failed documents with a Warning sign.

Distr. matrix validation failed Show all

| File name        | Version | Description  | Name         | Discipline    |
|------------------|---------|--------------|--------------|---------------|
| 2001-PIP-001.DWG |         | 2001-PIP-001 | 2001-PIP-001 | Architectural |
| 2001-PIP-002.dwg |         | 2001-PIP-002 | 2001-PIP-002 | Architectural |
| 2001-STR-001.dgn |         | 2001-STR-001 | 2001-STR-001 | Structural    |

If you have several failed documents and you want to see only those, you can **check the box** next to Distr Matrix validation failed.

**The Transmittal cannot be issued until all documents pass the validation.**

Documents Scheduling Audit Trail Responses

ences (0 folders). Viewing 1 of 3.

Search documents

Distr. matrix validation failed Show all

| File name        | Version | Description  | Name         | Discipline |
|------------------|---------|--------------|--------------|------------|
| 2001-STR-001.dgn |         | 2001-STR-001 | 2001-STR-001 | Structural |

### 3.1.4. Go to **Scheduling**

- Add the Issue date, Acknowledge due dates and reminders.
- The Response due date will automatically be set according to what is defined in the Excel file.

General Recipients Documents Scheduling Audit Trail Responses

**Planned issue**

Issue date:  9/19/2016 11:59 PM

Send reminder:  day(s) before issue date

**Acknowledgement due date**

Due date:  Fixed date: 9/19/2016 11:59 PM   
 Days after issue:  (9/19/2016 if sent today)

Send reminder:  day(s) before due date

**Response due date**

Due date:  Fixed date: 9/24/2016 11:59 PM   
 Days after issue:  (9/24/2016 if sent today)

Send reminder:  day(s) before due date

| Package Purpose | Name          | Max Respo |
|-----------------|---------------|-----------|
| For Review      | Architectural | 7         |
| For Review      | Structural    | 14        |
| For Review      | Civil         | 21        |

If you want to change the Response due date you can do so, but you can only enter values not higher than the one defined in the Excel file.

Document Distribution Matrix will validate this number.

Due date:  Fixed date: 9/24/2016 11:59 PM

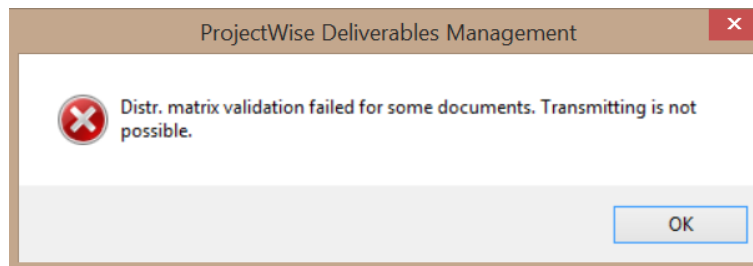
Days after issue:  (10/1/2016 if sent today)

Send reminder:  day(s) before due date

**Enter a value between 1 and 7 (as required by Document Distribution Matrix).**

### 3.1.5. Issue the Transmittal

If some files fail the Document Distribution Matrix validation, DM will not issue the transmittal until they are removed or corrected.



**Document Distribution Matrix will validate the files each time we open the Transmittal.**

To fix the files, Save the Draft, go to the files, modify the attribute and open the Draft.

View PWDM

| Name         | Discipline    | Description  | F |
|--------------|---------------|--------------|---|
| 2001-PIP-001 | Architectural | 2001-PIP-001 | 2 |
| 2001-PIP-002 | Architectural | 2001-PIP-002 | 2 |
| 2001-STR-001 | Architectural | 2001-STR-001 | 2 |

Distr. matrix validation failed

| File name        | Version | Description  | Name         | Discipline    |
|------------------|---------|--------------|--------------|---------------|
| 2001-PIP-001.DWG |         | 2001-PIP-001 | 2001-PIP-001 | Architectural |
| 2001-PIP-002.dwg |         | 2001-PIP-002 | 2001-PIP-002 | Architectural |
| 2001-STR-001.dgn |         | 2001-STR-001 | 2001-STR-001 | Architectural |

Once all files are validated you can Issue the Transmittal.

**Note:** If you want to issue the Transmittal even if some files don't pass the validation, you can clear the Distribution Matrix in General Tab.  
**It will leave all the participants, files and dates, but it will not validate anything.**