

ProjectWise Consultant Invoice Instructions

An Overview

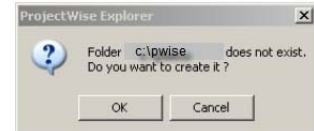
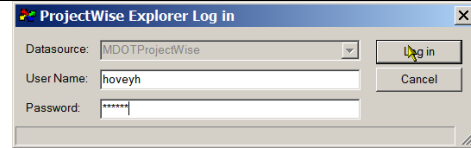
MDOT’s Electronic Invoicing effort is designed to take full advantage of the potential of innovative technologies for Michigan’s transportation industry. It embraces state-of-the-art document workflows/storage, and digitally encrypted electronic signatures.

1. Consultant Invoice:

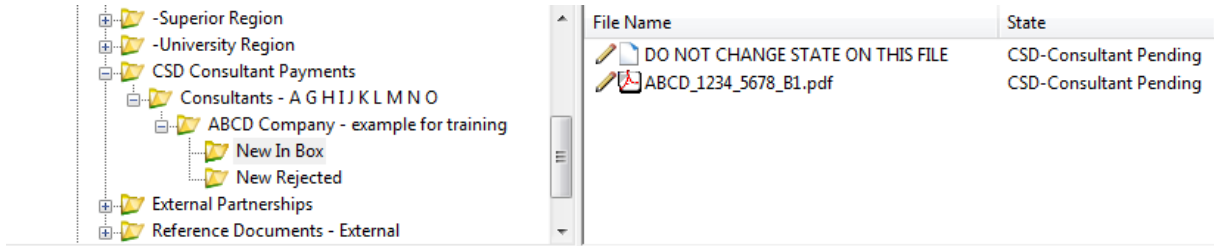
1	Prepare and gather invoice forms required to submit to MDOT and convert files to PDF format. If applicable combine files in the order requested by MDOT Contract Services Division (CSD).
2	<p>Please use one of the following Invoice naming conventions:</p> <p><u>First submittal of Invoice format:</u> “consultant”_“contract year”_“contract number”_“authorization # (if applicable)”_“billing #”.pdf <ul style="list-style-type: none"> • for example: ABCD_2013_5678_B1.pdf </p> <p><u>Resubmittal format:</u> “consultant”_“contract year”_“contract number”_“authorization # (if applicable)”_“billing #”_“resubmittal number”.pdf <ul style="list-style-type: none"> • for example: ABCD_2013_5678_B1_r2.pdf </p> <p><u>Authorization format:</u> “consultant”_“contract year”_“contract number”_“authorization # (if applicable)”_“billing #”_“resubmittal number”.pdf <ul style="list-style-type: none"> • for example: ABCD_2013_5678_Z4_B1_r2.pdf </p> <p><i>NOTE: The Billing number should be the same as the new standard billing period.</i></p>

2. Login to ProjectWise Explorer:

1	Start > All Programs > Bentley > ProjectWise v8i (SelectSeries4) > ProjectWise Explorer
2	Open ProjectWise Explorer
3	Select MDOTProjectWise in the datasource tree window (left window pane)
3	<p>The ProjectWise Explorer login dialog box opens.</p> <p>Enter your MDOT ProjectWise username and password. The entry for both is case sensitive.</p> <p><i>NOTE: When your password is accepted for the first time you will be asked to create a folder called c:\pwise. Select >OK to create it.</i></p> <p><i>You will not be asked to create this folder again. As documents are checked or copied out of ProjectWise, uniquely named sub folders are created on the fly as documents come out to your machine.</i></p>



3. CSD Invoice Folder Structure and Files:



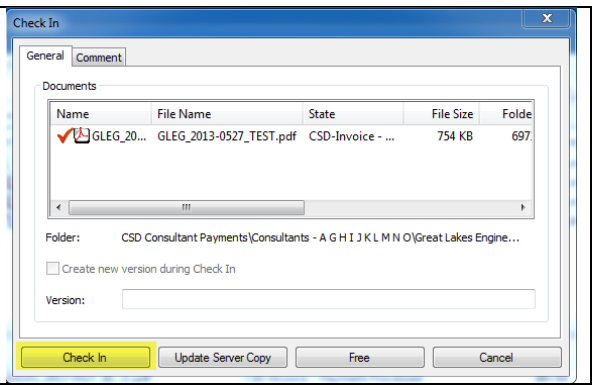
4. Adding Documents:

ProjectWise users can add documents into the system by dragging and dropping documents into the system.

<p>1</p>	<p>In Windows Explorer, browse to the file location, single left click on the file and hold.</p> <p>*You can also select multiple files in this same window by using your shift or control keys.</p>	
<p>2</p>	<p>Drag and drop the file(s) into the In Box file window.</p> <p>Select 'No Wizard' on the 'Select a Wizard' screen and click OK.</p>	
<p>3</p>	<p>File(s) are now in ProjectWise in the Pending state.</p>	

5. To check out, review and edit invoices in the Pending State:

<p>1</p>	<p>Double click on the Invoice file</p>
<p>2</p>	<p>This will check out and open the invoice in adobe</p>
<p>3</p>	<p>Review or edit the file.</p>
<p>4</p>	<p>Once you are done, save the file. In Adobe select File > Save</p>
<p>5</p>	<p>Exit File by click File > Exit or by click on the X in the upper right hand corner</p>

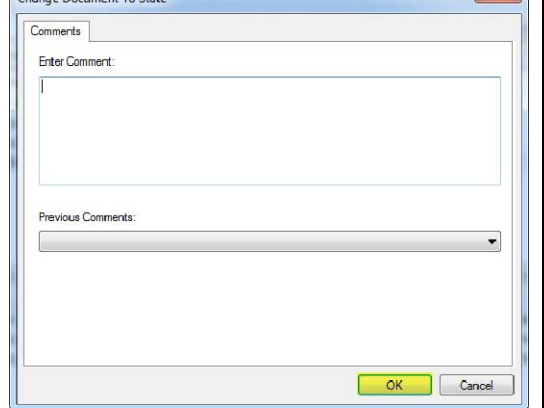
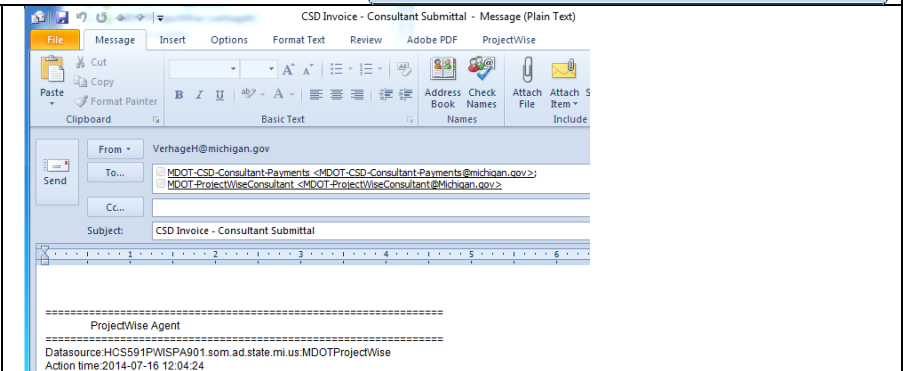
6	<p>Upon exit a 'Check In' window will pop-up. Click on the Check In box. This will update the ProjectWise file with your changes. You will be directed back to ProjectWise upon successful check in.</p>	
---	--	---

6. Submit Invoice to CSD for processing:

Workflows are an ordered group of milestones through which a document makes its way to completion. Workflows can trigger security changes using States. States are milestones (steps) within a workflow which push documents and information along the approval loop.

Documents are advanced along the workflow by changing states. To advance documents along the workflow do the following:

NOTE: Please have your 'Mail' program open before proceeding.

1	Right click on the invoice that is ready to be submitted to CSD	
2	Select Change State	
3	Select Next	
4	Click on OK in the 'Change Document to State' window	
5	An email will be generated, click on Send to submit the invoice to MDOT.	
6	The invoice submitted will 'disappear from view'. The file is still there, but security has been turned over to MDOT CSD.	





If you have any questions about ProjectWise, please email: MDOT-ProjectWiseConsultant@michigan.gov

Hints and Tips

Creating a ProjectWise Desktop Shortcut:

1	Navigate to the folder you would like to create a shortcut to.
2	Right click on the file you would like to create a link of
3	Select Copy Link(s) to Clipboard
4	On your desktop right click and select New > Shortcut
5	In the Create Shortcut Wizard paste the ProjectWise web link into the “type the location...” field
6	Click Next
7	Name your Shortcut
8	Click Finish

Icons – A Quick Visual Reference to Your User Rights:

ProjectWise uses standard Windows program associations to visually display file type and rights. Rights are displayed with a smaller icon to the left of the application.	
	A pencil next to the document/file means you can check out and modify the contents of the file.
	An open book next to the document implies read only permissions. You may view the file and perform a save as, but any changes made will not update ProjectWise.
	A red check mark means you have the document checked out and other users are locked out until you perform a check-in.
	Locked - Document is either checked out, or has been exported, by another user. You can still open this document as read-only.

Manipulating Documents:

After documents have been added, you can perform the following:

View	If you only need to view the file, no changes need to be made, right click on the document and select Open as Read Only.
Checkout (Edit)	The ProjectWise interface is very much like Windows Explorer (or My Computer). By default ANY file in ProjectWise that is double clicked on will be checked out and automatically opened by the associated application.
Check-in	Once changes have been completed close out of the application and right click on the file and select Check In,
Free	Use this operation when you have wrecked your active document and you Do Not want to update the server copy. WARNING!!! YOU CAN FREE A CHECKED OUT DOCUMENT THAT IS OPEN. When you close that file data will be lost.Free is one of many manipulation options available in ProjectWise. This operation deletes the checked out document from your ProjectWise working directory without updating the server version.

Adding a ProjectWise Link to an Email:

To add a ProjectWise document link into an email going to MDOT staff , do the following:	
1	Left click on the file you would like to create a link to
2	Single left click in the Address bar
3	Right click on the address bar and Select Copy URN
4	Open an email, right click and select paste