

Engineering Transmittal Management Module

Our Engineering Transmittal Management Module provides organizations with a faster way to transmit documents from one party to another, making communication with vendors, customers, and downstream contractors simple and intuitive, while keeping an audit trail of communications with the third parties. Overall, it helps companies manage and report on these communications in an organized manner that can be easily tracked by document management system administrators, ensuring each file is going where it needs to go.

The Engineering Transmittal Management module automates the creation, tracking, and reporting of formal transmittal packages for vendors, contractors, and other third parties. It allows you to easily set up transmittal cover sheets with technical and associated files, and is a closed-loop process that tracks acknowledgement and changes by recipients, including an integrated review and approval action process. Our engineering transmittal module makes it easy to send transmittals using the documents residing in the system, eliminating the need to download files and documents from the system before sending them to third parties. Simply select and incorporate drawings, specifications, contracts, and other project-specific files in a simple package that can be delivered by email or other offline means.

Module Key Features and Functions

- Send files, links to files, and/or a consolidated PDF of all documents, including a cover sheet and choose where they are stored
- Request confirmation notifications

- Use tailored transmittals templates for cover sheet creation, including corporate logos and layouts
- Copy previous transmittals, or make from scratch
- Create transmittals from existing document/drawing sets/packages with a preset list of actions needed and delivery options
- Limit transmittals to specific projects
- Provide version integrity to ensure file links always connect to applicable document versions
- Add custom fields to transmittals and cover sheets
- Permit non-user email contacts
- Freeze or lock transmittals once sent to prevent further updates from occurring
- Auto-create unique transmittal names/numbers or use naming rules driven by custom data fields
- Include validation rules to ensure transmittal is complete/approved before being able to be sent
- Track and report on all outgoing and incoming emails and events/changes and bounced emails
- For each transmittal, users can create a unique name for each transmittal
- If a user does not create a unique name, the system will automatically generate a unique name for each transmittal

Easy Transmittal Creation

Users can even create transmittal templates, which can be used over and over again for similar projects or similar vendors/customers. Better yet, if you don't want to create a new transmittal name each time, the system will automatically generate a unique name for easy and organized searching.

Transmittals are associated to specific versions of documents and drawings, and are locked from being deleted while an associated transmittal remains in the system. This ensures complete and accurate audit trails for specific transmittals. The system also tracks updated transmittals as new file versions are delivered to vendors/customers.

Engineering Transmittal Database Fields

The module allows users to provide project-related information to describe the contents of the transmittal. To avoid the need for further clarification, users are able to include details such as:

- Transmittal Name
- Project Name
- Due Date
- Create Date
- Email Subject Line
- Comments/Remarks
- Recipient Details
- Sender Details
- Confirmation Requirement
- Transmittal Contents
- Associated Documents
- Transmittal Status.

In addition to standard fields, transmittals can include custom fields that contain important status or project information such as project name and number, vendor/customer name, and package identification.

Transmittal Cover Sheets

Nýeúzzur sgeúvE ýár i i ózÁyi Ág° sPÁzsróÁG gýwzvōÁ vyi Áei í 4s9Nzi ýzÁgeúÁ úrywNíÁ Á î i k° úÁ úryeá Gēuf Ái Eszi ÁóÉzÁñ i i i i 9ÁvE ýár i i ózÁgeúÁÁgúí i ÁeúrvzōéúÁÁ Áóyēgōyi zōÁ sūr eoi zÁeuf Ágúr yeúÁÁvovÁÁÁr i Áyeúzzur sgeúÁ úryeá GÁzsróéúÁÁeÁÁ° óÁr i Ágřv vzi 9Á° ýÁ Á°zÁúr i ýÁ°yyvvoÁ eúr ÁzÁEesēgū Áv ÁzÁzōÁÁ° ÁÁÁyi eáúÁÁG ÁéózÁeuf Ágúr srbÁr i ÁéózÁvÁ l i ū Árēur i zÁÁ

Transmittal Management

Í °yÁ úrsú i ýsróÁE výuovE Áeuf Ávg° úri úóÁr eúreoi úri úóÁÁzÁ ú ÁývEs i zÁzi ýzÁE sř Ái E ýeÁÁ vyävúÁÁvÁgýi eáúÁÁeuf Ár eúreósróÁyeúzzur sgeúzÁÁ

Transmittal via Email

The transmittal module allows organizations to email transmittals, if they would like, and includes From, To, CC, and BCC fields just like your email client. The module allows users to select contacts from the system directory, and even enter users, groups, or contacts that are not system users. Transmittal creators can require transmittal recipients sent a transmittal via email to confirm receipt of the email, which is recorded and tracked within the system. Any confirmations or other communications related to the transmittal can also be sent to internal transmittal contacts to notify them of the receipt, acknowledgement, and approval.

Nzi ýzÁgeúÁÁi ūi Ár i Áyeúzzur sgeúÁE sř Ár i ÁrēdEi Á ū zÁzÁegēgř ūri úóÁeuf ÁvÁÁgúí i ÁsúrÁvÁÁr i Á úrēdEi Á ū zÁÁÁr i ÁvE ýár i i óvÁÁr i Áyeúzzur sgeúÁ úr esóÁýÁzÁÁg vúzvs eá í Ár° úÁ4,eoi Á ÁEÁ l i ÁvÁeufÁg vřsúrēävúÁÁkÁr i Ár ýi i 9Áñ i Ár° úÁ4,eoi Á ÁEÁÁgúí i zÁr i Ágve ýár i i óÁ ū Áeuf Á geúÁÁv úzÁzōÁ kÁ 3 i ýi úóÁ ū Áv ýr eá zÁeúÁÁÁ ūi Á ÁEÁÁv E srbÁzi ýzÁvÁÁgúí i ÁÁÁÁÁ ýeÉ srbzÁÁ zyí gđ geävúzōÁr eúr° euzōeuf Áyēgōyi zÁeúÁÁÁ ūi Á ÁEÁÁ ūi 9

Finding and Listing Transmittals

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- Transmittal Name
- Transmittal Status
- Create and Due Dates
- Recipient and Sender Names
- Associated Files and Documents
- Transmittal Contents
- Other.

Łæø zÄÄr ésróéúí í ÁvýéúÄi úróðéúúr gúéúÄéúúí úróÄýi éä í ÖÁvúł ýúri í ÖÁ éýöéúÄVÄ Ávúł ýúri í Áúf Árvýi 9FszÖVÁkýeúúúr gúéúÄéýi Á sýúéüí í ÁúÄÄÄ ü ýi í Ái éýğr ÁE úf vÉ 9ÄúÄVÄzÖÁ vŁkýeúúúr gúéúÄr í ì äúóÄr í Ái éýğr Áýsá ýéÁéúÁgi Á vÉ úwéi í ÁvÄÄÄLÖÄ ü ÁE sí ÁÄÁúóü Áúéú9Ä Lì Eì ýéÄýi kúýú égi í Áýeúúúr gúéúÄi ývúóÄéýi ÁéúvÄEéúéúü 9

Tracking Transmittals & Change Actions

ÁúéögávúúÄézzv gúéä í ÁE sí Áéýi éä í Áýeúúúr gúéúÄéýi Áýéguí í ÁE sí úrÄr í ÁVzä ú 9NF szÄúéúúí zÄ öi ÁýsósúéüÁ ú éúéúf ÁéúÄýi gí éi í Ávúł ýú éävúúéúf Áéğr éúóü ÁwÄÄr éöÄúéúúí zÄúÄVÄ gř éúóü zÖÄi ü ävúúöVýéi í ävúúöÉzÄi úéZÄývýi ýüÄğr éúóü zÄ°gr ÁézÄÄ É Ái Észúúú9NF í ÁVéögÄ í éä Áéúf Áúü Áýi Áýéguí í Áúf Ár í Ái öészÄVÄ éğr Áéögávúúéýi Ái gýi í í 9Ä

In addition, a transmittal confirmation log is kept and is available to users. The log maintains all confirmations received against the transmittal, as well as unconfirmed emails. Each confirmation email and any comments are attached to the log creating an audit trail of who confirmed receipt and when the confirmation occurred. The log entry also displays the reply and comments received.

Ö Nğ ví °ü Äi úf Ł öz

- J ývÉs í Á°güÄi ŁEi ýVÄÄ ýéE úrózÄúf Á vğ°úri úróÄVÄVúúéögávúúÉ úf ýzöéúf Ág°zä úri ýzÄ éúf Á úz°ýi Ári Árvzöé°ýi úróü zÄi ýzsvúúéýi Ái ŁEi ýi í
- Áýi éä zÄéğvúryü ä Áé°i öÁýésÄVÁéúéúvúú ú°úéögávúúéúf ÁýéguzÄE ři úÄi zyvúzi zÄVÄ öýeúúúr gúéúÄéýi ÁE ýi °i Ä
- J ýi Eì úróz°éúéü ÁVÄ vğ°úri úró° ýéE úrózÄ úróÄr í VÄri í öýi ü ézi ÁyyývÉeúÁýsá ýéÄ
- ŁEi Áúü Áéúf Ái í °gí ÁE úr úsúóýeäE Áöéł ÁgVzöÄ
- Öüf éúéü ÁE sí ÁýéüÄVéúú ú°úéögávúúzÄ