
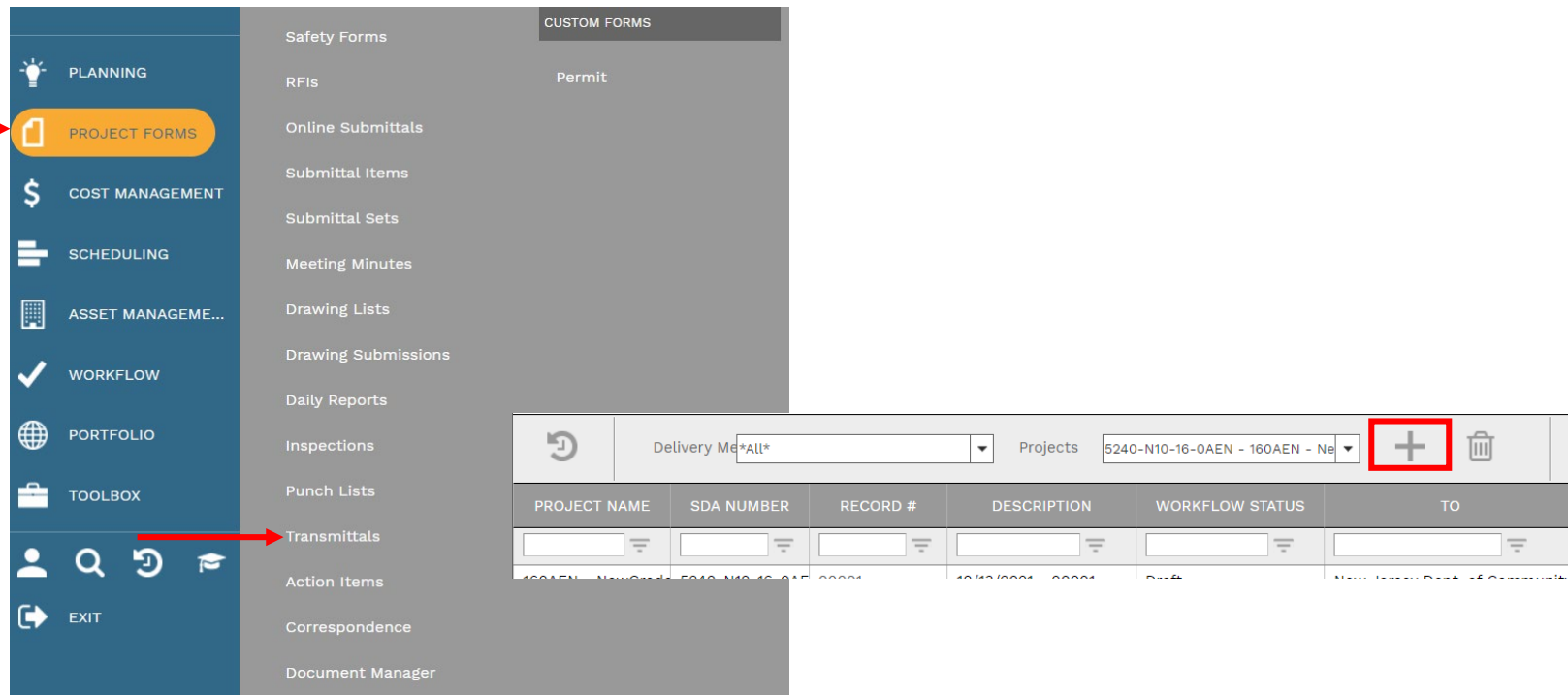


OPEN THE MODULE

- Choose **Project Forms** -> **Transmittals**
- This displays the **Manager View** for the module and shows all records.
- To search for a document to modify, use the columns to filter for the data you need. For example, use the Record # column to search for a document.
- To add a new document, click the **Add** button 




The screenshot shows the PMWeb interface. On the left is a navigation menu with categories: PLANNING, PROJECT FORMS (highlighted with a red arrow), COST MANAGEMENT, SCHEDULING, ASSET MANAGEMEN..., WORKFLOW, PORTFOLIO, and TOOLBOX. Under PROJECT FORMS, the following items are listed: Safety Forms, RFIs, Online Submittals, Submittal Items, Submittal Sets, Meeting Minutes, Drawing Lists, Drawing Submissions, Daily Reports, Inspections, Punch Lists, Transmittals (highlighted with a red arrow), Action Items, Correspondence, and Document Manager. On the right, the 'CUSTOM FORMS' section shows 'Permit'. Below the menu is a table with columns: PROJECT NAME, SDA NUMBER, RECORD #, DESCRIPTION, WORKFLOW STATUS, and TO. The table contains one row of data. Above the table is a search bar with a dropdown menu set to 'Delivery Me*All*', a 'Projects' dropdown set to '5240-N10-16-0AEN - 160AEN - Ne', and an 'Add' button (a plus sign in a square) highlighted with a red box. There is also a trash icon next to the Add button.

PROJECT NAME	SDA NUMBER	RECORD #	DESCRIPTION	WORKFLOW STATUS	TO

ADD A NEW RECORD

- Enter all relevant information in the **document**. Any field marked with an asterisk is a required field. If this a Revision, change this number to reflect the revision number. If this is a close out transmittal, change the Transmittal # to CL1.
- Remember that this document will need to be set to closed upon completion.
- Click the **Save** button when finished.

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MAIN

Project*

Transmittal #*

Description

Status / Revision Draft 0

Date 📅

Contract #

To ⋮ ▼

Address

From ⋮ ▼

Category ▼

Shipped Date 📅

Shipped Time 🕒

Via ▼

Tracking #

Due Date 📅

X	REMARKS
No records to display.	

Comment

ADD DETAIL ITEMS

- Click **Add** on the **Details** tab (SDA Data) to add additional detail items. Information includes Description of item, Assigned party, Due Date and Status. Click the **Save** button in the Details section after each entry.

The screenshot displays a software interface with a navigation menu on the left and a data table on the right. The navigation menu includes the following items: Status, We Are Sending, Submitted For, Actions Taken, Details (highlighted with a red box and a red arrow), Closeout - Sub Comp, Sub Comp - Deliverables, O And M Deliverables, Final Comp - Deliverables, and Contract Close-Out. The data table has columns for SPEC, UOM, DATA, and NOTES. The table contains two rows: BIC and Priority. The Priority row has the value 'Medium' in the DATA column.

MAIN	SDA DATA	NOTES (1)	ATTACHMENTS	NOTIFICATIONS
Edit				
SPEC				
UOM				
DATA				
NOTES				
BIC				
Priority				
Medium				

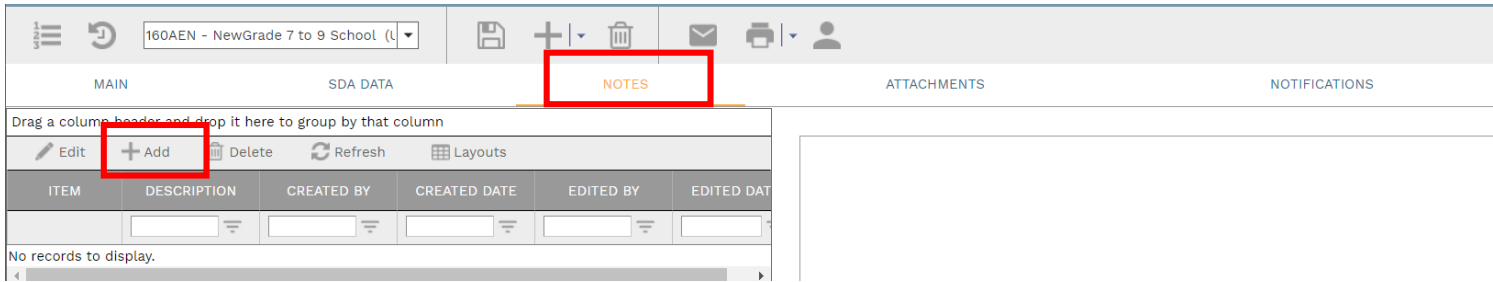
SDA DATA TAB / CLOSE OUT INFORMATION

- Click the applicable **Close Out tabs** to complete project close out information.
- Click the **Save** button after each entry

MAIN	SDA DATA	NOTES (1)	ATTACHMENTS	NOTIFICATIONS
Status We Are Sending Submitted For Actions Taken Details Closeout - Sub Comp Sub Comp - Deliverables O And M Deliverables Final Comp - Deliverables Contract Close-Out	Edit			
	SPEC	UOM	DATA	NOTES
	BIC			
	Priority		Medium	

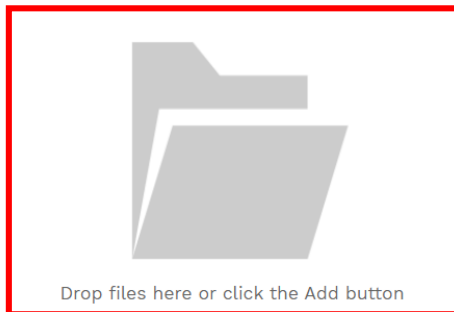
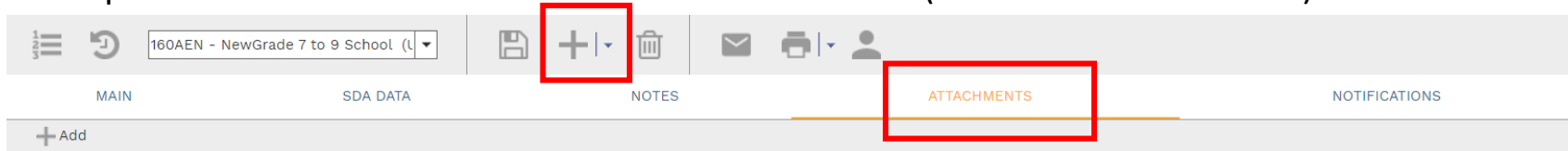
ADD ADDITIONAL NOTES

- Click **Add** on the **Notes tab** to add additional notes as needed. Click the **Save** button after each entry.



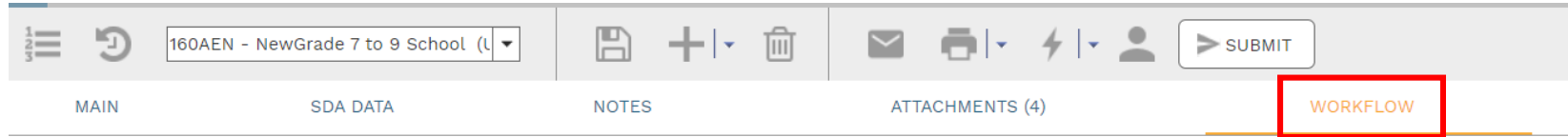
ADD ATTACHMENTS

- Drag and drop files on the **Attachments tab** to add attachments (or click the Add button). Click the **Save** button after each entry.



SUBMIT TO WORKFLOW

- Click the **Workflow** tab to start the workflow process. Enter the email information and any application comments, then click the **Submit** button to start the workflow approval process. You can return to this section to review the progress of the approvals.



The top navigation bar includes a menu icon, a refresh icon, a dropdown menu with the text "160AEN - NewGrade 7 to 9 School (U)", and icons for save, add, and delete. To the right are icons for email, print, lightning bolt, and user profile, followed by a "SUBMIT" button. Below the navigation bar are tabs for "MAIN", "SDA DATA", "NOTES", "ATTACHMENTS (4)", and "WORKFLOW". The "WORKFLOW" tab is highlighted with a red box.

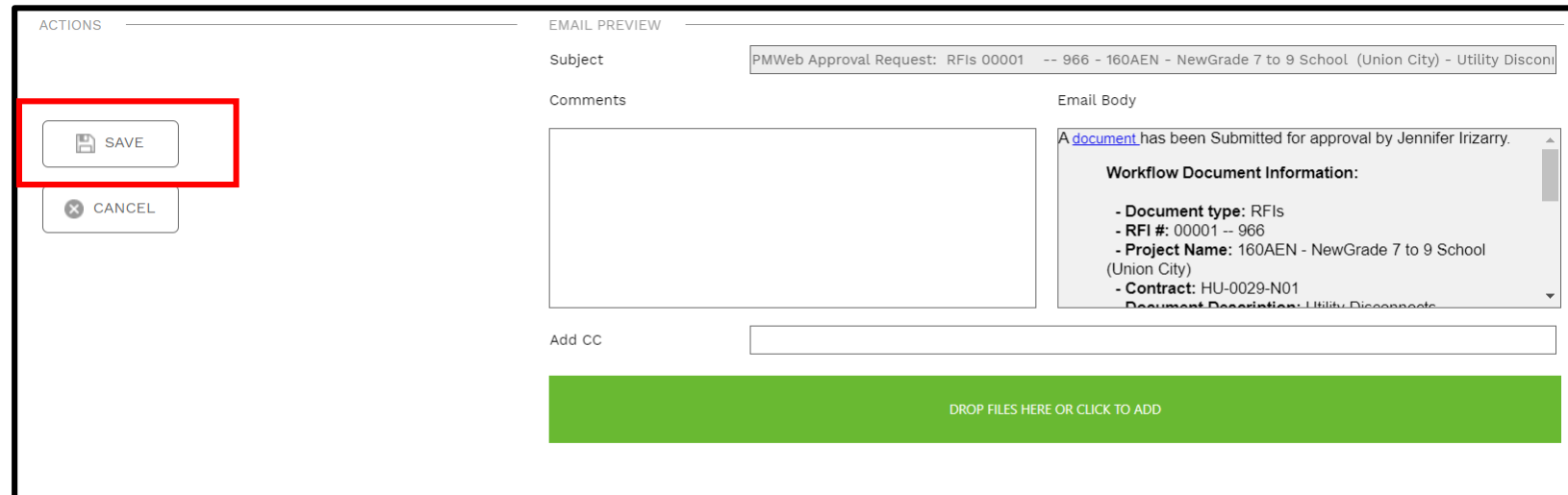
ACTIONS



A button with a right-pointing arrow and the text "SUBMIT" is highlighted with a red box.

BUSINESS PROCESS

WORKFLOW LOG



This section shows the "EMAIL PREVIEW" form. It includes a "Subject" field with the text "PMWeb Approval Request: RFIs 00001 -- 966 - 160AEN - NewGrade 7 to 9 School (Union City) - Utility Disconn", a "Comments" text area, and an "Email Body" field containing the text "A [document](#) has been Submitted for approval by Jennifer Irizarry." Below the email body is a "Workflow Document Information" section with the following details: Document type: RFIs, RFI #: 00001 -- 966, Project Name: 160AEN - NewGrade 7 to 9 School (Union City), and Contract: HU-0029-N01. There is also an "Add CC" field and a green "DROP FILES HERE OR CLICK TO ADD" button. The "SAVE" button in the "ACTIONS" section is highlighted with a red box.