

TRANSMITTALS

The **Transmittals** module is being utilized to track two different types of documents:

- **Transmittals** – A Transmittal is a cover sheet used when sending project documentation. It summarizes what is included in the package, what action is being requested and other package summary information.
- **Project Close Out** – This module is also capturing close out data for specific project.

To navigate to Transmittals, click **Project Forms**, then **Transmittals** from the left hand menu. This displays the overall **Manager View** for the module and shows all records for all projects.

To search for an existing document, use the columns to filter for the data you need. For example, use the Record# column to search for a document. You can also narrow your search by school name by selecting it from the **Projects** drop down menu.

To add a new document, click the **Add** button.



The screenshot displays the software interface. On the left is a dark blue navigation menu with icons and labels: PLANNING, PROJECT FORMS (highlighted with a red arrow), COST MANAGEMENT, SCHEDULING, ASSET MANAGEME..., WORKFLOW, PORTFOLIO, TOOLBOX, and EXIT. To the right of the menu is a list of sub-items: Safety Forms, RFIs, Online Submittals, Submittal Items, Submittal Sets, Meeting Minutes, Drawing Lists, Drawing Submissions, Daily Reports, Inspections, Punch Lists, and Transmittals (highlighted with a red arrow). Below the menu is a table with the following columns: PROJECT NAME, SDA NUMBER, RECORD #, DESCRIPTION, WORKFLOW STATUS, TO, FROM, and VIA. The table contains one row of data. Above the table is a toolbar with a refresh icon, a search box containing 'Delivery Me*All*', a 'Projects' dropdown menu showing '5240-N10-16-0AEN - 160AEN - Ne', a red-bordered '+ Add' button, a trash icon, a refresh icon, a grid icon, and an 'X' icon.

The **Header section** is the top portion of the document screen. Enter the following information in the Header:

- Project (**required**)
- Transmittal # (**required**) – if this is a close out transmittal, change the Transmittal # to CL1
- Description
- Reference – contract #
- Revision – is this is a revision, change the revision number
- Date
- To
- Address
- From
- Category
- Shipped Date
- Shipped Time
- Via
- Tracking #
- Due Date
- Comment

Once completed, click the **Save** button to continue.

The screenshot shows a software interface with a header bar and a main content area. The header bar contains several icons: a menu icon, a refresh icon, a search box, a **Save** icon (highlighted with a red box), a plus icon, a trash icon, an envelope icon, a printer icon, and a user profile icon. Below the header bar, the word "MAIN" is displayed in orange. The main content area is divided into two sections. On the left, there is a form with the following fields: Project* (dropdown), Transmittal #* (text), Description (text), Status / Revision (dropdown with "Draft" selected and a numeric field with "0"), Date (calendar icon), Contract # (text), To (dropdown with a menu icon), Address (text), From (dropdown with a menu icon), Category (dropdown), Shipped Date (calendar icon), Shipped Time (clock icon), Via (dropdown), Tracking # (text), and Due Date (calendar icon). On the right, there is a table with a header row containing "x" and "REMARKS". Below the header, the table contains one row with the text "No records to display." Below the table, there is a "Comment" label and a large text area.

The **SDA Data tab** contains each piece of information, listed under the applicable tabs.

Enter the information for the Transmittal as needed and click the **Save** button when finished.

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	

The **SDA Data tab** will also track information for Close Out.

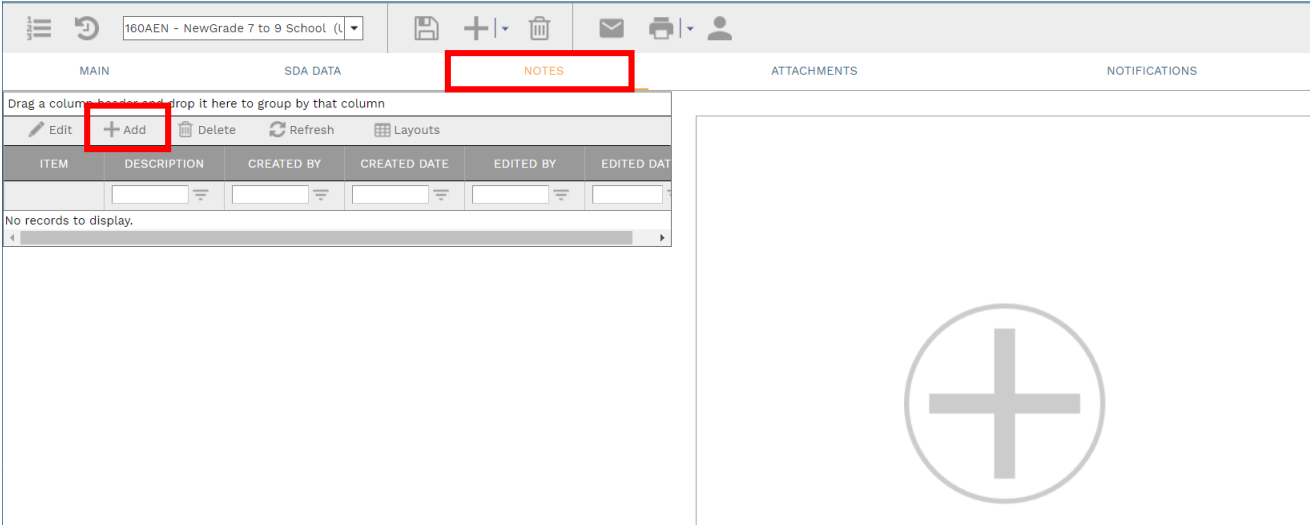
- Closeout – Sub Comp
- Sub Comp – Deliverables
- O and M Deliverables
- Final Comp – Deliverables
- Contract Close-Out

Click the **Save** button when finished.

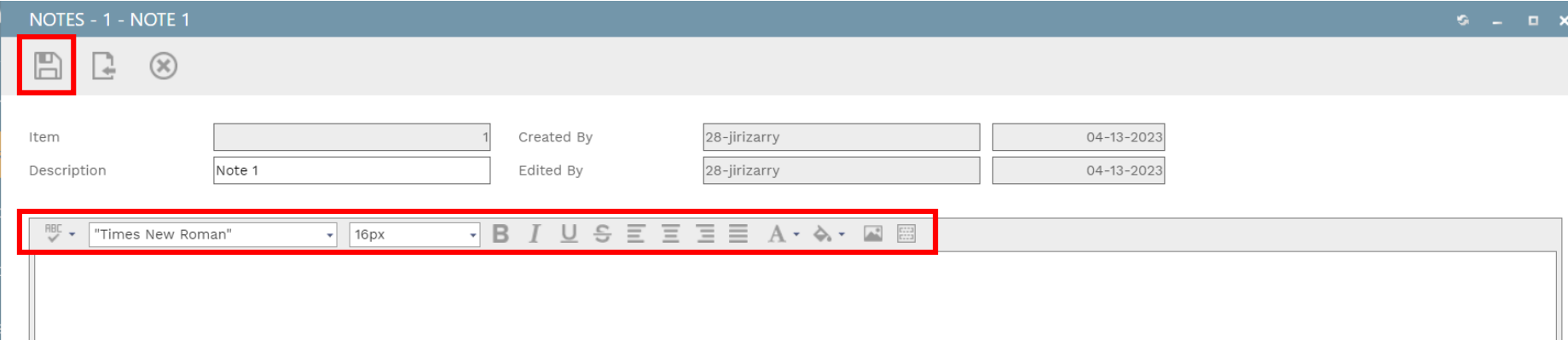
MAIN	SDA DATA	NOTES (1)	ATTACHMENTS	NOTIFICATIONS
Status				
We Are Sending				
Submitted For				
Actions Taken				
Details				
Closeout - Sub Comp				
Sub Comp - Deliverables				
O And M Deliverables				
Final Comp - Deliverables				
Contract Close-Out				

EDIT	SPEC	UOM	DATA	NOTES
	BIC			
	Priority		Medium	

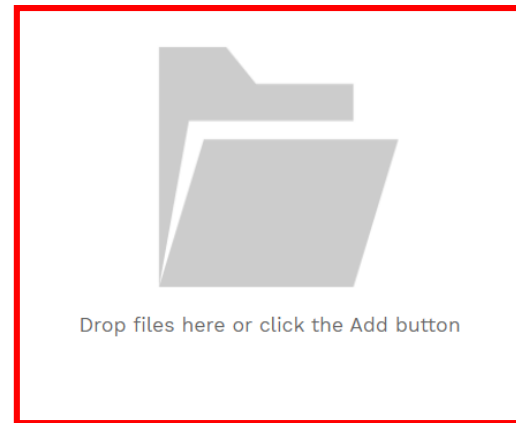
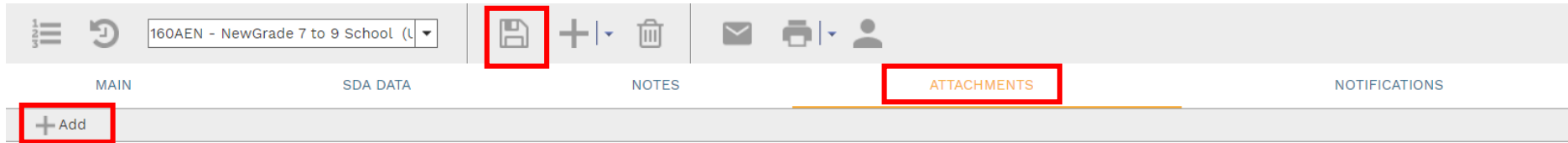
Click **Add** on the **Notes tab** to add additional notes as needed.



Enter your notes in the field provided. The text can be formatted using the toolbar shown. There is no limit to the amount of text you can enter. Click the **Save** button when completed.



On the **Attachments tab**, you can drag-and-drop your desired attachment(s) in the middle section of the screen, or you can choose **Add** to manually navigate to the location of your attachment on your computer, and add it through that window. Repeat the process for all additional attachments. Click the **Save** button when finished.



To print transmittal information, click the **print button** and select **BI Reporting** from the drop down list. Choose an option from the report menu to receive your output (either Adobe or export to Excel) or to cancel the Reports Preview screen.

160AEN - NewGrade 7 to 9 School (L)

MAIN SDA DATA NOTES ATTACHMENTS COLLABORATE NOTIFICATIONS

Drag a column header and drop it here to group by that column

Edit Add Delete Refresh

REPORTS PREVIEW

REPORT	RECORD TYPE	DEFAULT
SDA_Transmittal Form	Transmittals	✓
SDA_Transmittals_SummaryLog	Transmittals	
Transmittal Form	Transmittals	
Transmittals	Transmittals	

Select a Report to Preview it

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Note: Please be patient when waiting for output from a selected report. It may take a few minutes to load the data.