TRANSMITTALS USER GUIDE

DOCUMENT MANAGEMENT



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CHAPTER 1 – INTRODUCTION TO TRANSMITTALS

Transmittals are used within InEight to issue documents to recipient(s) with the option of also adding a reason for issue and response required date.

The documents being transmitted must already be in the Document Register and the sender must already have access to both the documents and the file formats being transmitted.

The transmittal module includes Inbox, Drafts, Sent Items and Pending. If you have access, they can be found by selecting Transmittals from the left menu.

Included in Figure 5	ocument Training Project Master		V 🔧 🔳 🔍 Search	Contacts 🖌 Lh Reports	🗘 Admir
New Y	Inbox		Search all Inbox	Go Advanced Saved D Personal	
	Reply 💌 Reply All 💌 Forward 💌	Refresh Print Export • More •			
Dashboard	🔲 👔 Transmittal No.	Received - Package	Subject	Message	From
Dashboard		T dd-mm-yyyy 🗐 T T	T	T	
🛿 Mail	TRAINING501000352	27-11-19 04:39 AM	Trnasmittal	Hi Joe, Please see the latest released docu	n Joe Frederick
_	HCC-000406	20-11-19 07:37 AM LE-STRUC-20192011	Notification of Package Issue. Reason: Issue	d Hi team, Please refer to the structural document	s Joe Fredericks
Documents	TRAINING501000287	18-10-19 07:45 AM	Structural Docuemnts	Hi, Please refer to the latest revision of structura	al John Smith
Transmittals	TRAINING501000258	02-10-19 05:31 AM	PDF files Merge		Frank Jacobs
	TRAINING501000223	19-09-19 07:29 AM	Document Testing	Regards, Joe	Joe Fredericks
Inbox	🔲 👔 TRAINING501000152	13-08-19 05:00 AM	test		Frank Jacobs
Drafts	🔲 🔬 TRAINING501000151	13-08-19 04:59 AM	test		Frank Jacobs
Sent Items	TRAINING501000109	02-08-19 09:24 AM	Civil Documents	Regards, Joe	Joe Fredericks
Pending	TRAINING501000001	14-06-19 08:44 AM	Transmittal this!!	Status Codes AB – As Built CAN - Cancelled DD -	- Joe Fredericks
Packages	HCC-000285	11-06-19 02:25 PM TEST_PACKAGE	Notification of Invitation to Tender	send your tenders plz!	Joe Fredericks
	HCC-000283	10-06-19 08:32 AM	Notification of Document Transmittal	Hi DC, Please distribute these drawings. regards	Joe Fredericks
Tasks	☐ () HCC-000273	27-05-19 07:08 AM	FW: Test Transmittal - II	Testing regards, Joe	Joe Fredericks
	HCC-000261	08-05-19 10:57 AM CRRDA-ELEC-0001-IT	Notification of Addendum to Package	Please find new revosions	Joe Fredericks

Clicking on one of these options, opens the register view.

Transmittals can be sorted by clicking on column headers or using the column filters. You can also search for transmittals using the Quick Search box above the register or by clicking on **Advanced**.

Double click to open, read and respond (if option is available) to transmittals.

Use the check boxes next to a transmittal to select it and then perform actions using the options above the register such as **Reply**, **Reply All** or **More>Duplicate (With or Without Attachments)**.

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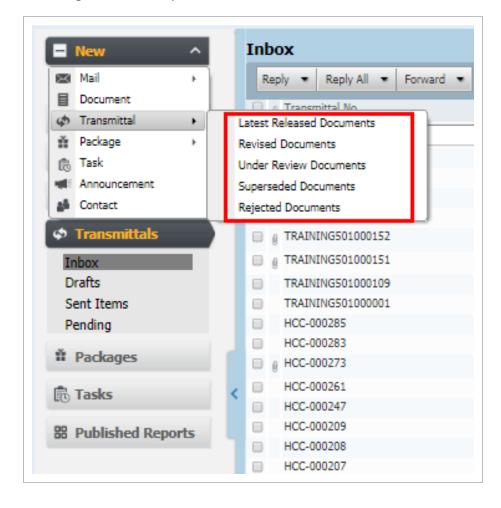
CHAPTER 2 – OUTGOING TRANSMITTALS

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2.1 CREATING AND SENDING TRANSMITTALS

To create a transmittal:

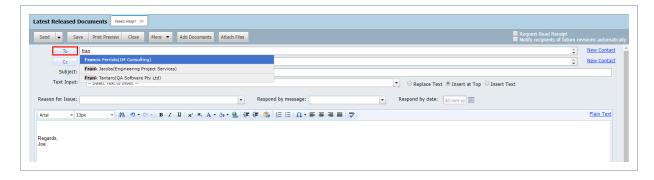
1. Click the **New** button in the top left of the screen then **Transmittal**. Choose between the following transmittal options:



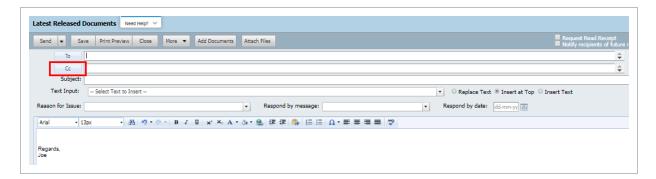
- Latest Released Documents: (Default) Used to transmit the latest released revision of one or more un-restrained documents the user has access to.
- **Revised Documents:** Used to transmit the latest revisions of documents to recipients who have received previous revisions of the same documents.
- Under Review Documents: Used to transmit documents currently in a workflow to any of the following: Project Administrator; Document Originator; Review Coordinator; or other Reviewers. The use of this option is generally restricted to: members of the review team for the workflow in progress; review coordinator for the documents; Document Originator; and Project Administrator.
- **Superseded Documents:** Used to distribute older revisions of documents where the latest revision of the document may not be released, or the older revision must be sent to someone outside the system.
- **Rejected Documents:** Used to transmit comments and redlines to the Originating Company. This option is normally restricted and must be enabled on a project by the Project Administrator.
- 2. Alternatively, from the Document Register select the documents then Transmit.

0	cu	mei	nts									Search	all Docur	nents	Go	Advanced	Saved	Latest U	nrestraine	d
	Ne	w	Duplicat	e Download	Bulk Upl	load Review	Release	Transf	er to 🔹	Refresh	Print	Export	• T	ransmit	: 🔹 More	•				
0	ø	î 🔒	Q ~	Date Recorded		Document No.		T T	tle	T	Rev	/ Sts	Di	Cn	eate Transmitt eate Standard I	Package	а	Review Status	•	Date F
2	ø	i	R.	13-03-19 08:40		01.01			evel 3 Fire	Saftey Design	D	IFC	AR.	Cr	eate Tender Pa	ckage		Released	ß	11-09
	B	1		13-03-19 08:40	D AM	01.02.04		F	oyer Desig	n Template	С	IFI	ARC	н	DRAWING	MAIN		Un-Restrained		13-03
	ø	1	Q	13-03-19 08:40	D AM	01.03.01		М	ANUFACTU	JRING DRAWI	NG F	IFC	ARC	н	DRAWING	MAIN		Released		24-09
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				08-03-19 09:33	1 AM	030819-001		S	te Plan		В	IFI	ELE	С	MAN			Un-Restrained		08-03
			Ð	12-08-19 08:01	1 AM	04.01.2019-К9		S	te Plan		D	IFA	PLU		SHOPDWG	ATR	ATR	Un-Restrained		12-08-

3. Click **To** and select the recipients from the Contacts list. Alternatively use the **Auto-complete** feature to quickly populate the recipients in the **To** box by typing the first few letters of each person's name.



4. Click **Cc** and select any recipients to receive a Cc copy. Recipients receiving a transmittal as a Cc value are treated in the same way as those receiving the transmittal as a To value.



5. If available, select the appropriate options from **Text Inputs.** These will contain predefined strings of text for the subject line and / or the details windows.

Send Save Print Preview Close More Add Documents Attach Files	
To Cc Subject:	
Text Input: Select Text to Inset. Rease in for Issue: Select Text to Inset Status codes	O Replace Text Insert at Top Inser Insert at Top Inser Insert at Top Inser
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- 6. Click **Add Documents** and search in the Advanced Document Search window as required. If generating a Transmittal of Review, Rejected or Superseded documents, the system will also further filter for documents in the respective Register View.
- 7. Select the Documents and Document View File Formats to transmit and click OK.



- 8. Populate the remaining details including:
 - Reason for issue
 - Respond by message
 - Respond by date

• Transmittal message.

test Released Documents Need Help?	×	
Send 🐱 Save Print Preview Close	More Add Documents Attach Files	
То		
Сс		
Subject:		
Text Input: Select Text to Insert		
Select Text to filsert	·	Replace Text Insert at
Reason for Issue:	Respond by message:	
Reason for Issue:		
Reason for Issue:	Respond by message:	
Arial • 13px • 🏦 🤊 •	Respond by message:	
Reason for Issue:	Respond by message:	
Arial • 13px • 🏦 🤊 •	Respond by message:	

9. Tick the **Request Read Receipt** option if required. This facilitates auto update of the transmittal acknowledgement date.

			Request Read Receipt
nd 💌 Save Print Preview Close More •	Add Documents Attach Files		 Noury recipients or nuture revisions automatic
То			New Contact
Cc			New Contact
Subject: Text Input:		▼ ○ Replace Text Insert at Top	Insert Text
son for Issue:	 Respond by message: 	Respond by date: dd-mm-yy	
ы • 13рх • 🕅 • 🔍 • В	/ Ξ x' × Α · ③ · ⑧ 律律 ጫ 恒 注 [Ω · 亜	=== *	<u>Plain Text</u>
ards.			

10. The View File formats selected will be the formats that the recipients have access to download. It is possible to include public Text or File Attachment comments relating to the documents

selected Include Comments.

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Send Save Print	Preview Clo	se Mor	re 💌 Add Document		one of messager					
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Regards, Joe										
1 Documents										
<u> 1 Documents Remove All </u>	Remove Selec	<u>ted</u>				Download All	Download sele	ected files		
		<mark>cted</mark> Sts Tit	le	Disc	Cat	Download All PD	F DWG		OTHER Inc	clude comment

- 11. Click **Send** and **OK** when prompted.
- 12. A generated transmittal is displayed and can be printed if required.

teply Reply All Duplicate Resend Cancel Print Message Documents Recipients	Save changes	More 🔻 Close				
Vo attachments	_					
	Docu	nent Transn	nittal		LC	C
	Project Number: TRAINING501 Project Title: InEight Document Training Project Master Date: 28 November 2019, 06 24 24 AM +05:30 Reason for Issue:				Transmittal No: TRAINING501000353	
	Subject: Message:	Structural Docu	uments			
	Regards, Joe Transmitted	Го:			L ₈	
	Company				Name	
	Engineering	Project Services			Frank Jacobs	
		lownload all Transmittal files ment Nos to download them				- 1
	Item Docu	ment No	Rev	Sts	Title	
	1 <u>01.01</u>		D	IFC	Level 3 Fire Saftey Design	
	Transmitted	by: Joe Fredericks, Houston	Contracting			_
	Generated by Te	amBinder © 2001-2019 QA Soft	ware Pty Ltd			

13. Click **Close** and **No** if prompted to save changes.

NOTE

- Recipients will receive the transmittal notification via email. Documents can be downloaded individually from the links on the transmittal.
 - To download documents in bulk the recipient can select **Click here to download all Transmittal files**. All documents are selected by default, the recipient can select documents to download.
 - If all the documents on a transmittal are in PDF format these can be merged into a single PDF file for download by ticking the **Merge PDF files** option.
- Comments in relation to documents on the transmittal (if selected during the transmittal process) can be downloaded by the recipient using the comments icon.
- Recipients can be automatically notified about future revisions of the documents being transmitted by selecting the option **Notify recipients of future revisions automatically**.
- Use the **Remove all docs**; **Remove selected docs**; **View Selected**; and **Clear selected** options to simplify working with large numbers of documents.
- If the recipient is not listed in the Address book, new recipients can be added on the fly (subject to the normal InEight Document security).
- Contact Groups can be selected by clicking the **Contact Groups** option at the Select Recipients screen.
- Use More then Add Items to Transmittal Thread to link the transmittal to items of mail, documents or other transmittals.
- To generate a preview of the transmittal before sending, click **Print Preview**. Note that the Transmittal if previewed and then printed, will have a heading **DRAFT** as it has not been sent.
- If there are public comments / redlines associated with the document these can be downloaded. From within the Transmittal details window go to More and select Download Comment Attachments.
- When downloading a document from a transmittal a prompt to download a later revision will appear if a later revision has been uploaded and the recipient has access.
- The Subject of a transmittal can be auto generated (for example in the format Project # plus Transmittal #). Contact InEight for more details on this.
- The option to Notify recipients of future revisions automatically can be removed

NOTE if required. Contact InEight for details.

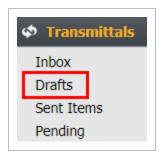
• It is possible to send "Confidential" transmittals in InEight Document where only the sender and recipient(s) can view the transmittal. This must be enabled by InEight. If enabled users will see an option to **Send Transmittal as Confidential** when composing the transmittal.

2.2 DRAFTS

Transmittals that have been created and saved but not Sent are stored in Drafts permanently until either Sent or Deleted.

To access and send drafts:

1. From the left menu, click Transmittals and Drafts.



- 2. To open a transmittal for further editing, double click on it and edit as normal.
- 3. When finished either click **Save** (the transmittal will remain in the Drafts) or use the **Send** button

from within the transmittal.

Revised Documents	Need Help? 🗸							
Send 👻 Save	Print Preview Close M	lore 💌	Add Do	cuments	Attach Fil	es		
To John Smith(Houston Contracting) × Transmittal Receiver(Houston Contracting) × U1 17								
Subject:								
Reason for Issue:						Res	pond	
Arial - 13px	- # • - •	BI	<u>U</u> ×	× ₂ A -	اي ج	1 i i		
Regards, Joe								
Remove All	<u>Remove Selected</u>		<i>c</i> :					
Recipients	Document No.	Rev	Sts	Title				
🔲 🚊 John Smith (Houst	c 2R-001-RR	В	IFR	site plan				
Transmittal Receiv	e 2R-001-RR	В	IFR	site plan				
🔲 🖹 U1 170419 (1M Co	r 2R-001-RR	В	IFR	site plan				

NOTE

- Printed drafts will display DRAFT at the top of the page and do not have a transmittal number. The transmittal number is assigned only once the transmittal is sent.
 - The ability to save a transmittal is limited to only general transmittals and transmittals of superseded documents.
 - If a document in a draft transmittal is revised prior to the transmittal being sent, the revised document will be automatically removed from the transmittal. The user is notified when opening the draft transmittal.

2.3 CONDUCTING TRANSMITTAL REVIEWS

On some projects certain transmittals must be reviewed by one or more people prior to being sent. This is managed in InEight Document using the **Send for Review** option rather than the **Send** option when generating transmittals.

Transmittal sent for Review can be:

- Reviewed and returned to the originator for sending.
- Reviewed and sent on to the intended final recipient(s).
- Kept at a draft and sent to another internal user for review.

To send transmittal for review:

1. Click the arrow next to the Send button and select Send for Review.

TRAINING501	- New Latest Released Documents - Google Chrome
 Not secure 	teambinder.com/TeamBinder19920/Transmittal/tbNewTransmittal.aspx?Type=16&IntTrmt
Latest Released D	ocuments Need Help? V
Send 💌 Sav	e Print Preview Close More Add Documents Attach Files
Send for Review	
Cc	
Subject:	
Text Input:	Select Text to Insert
Reason for Issue:	 Respond by message:
Arial • 13	x ・ 約 ヴ・♡・ B Z U x' × A・ ③・ ⑧ 律 律 剛 毎 注 I Ω・ 手 三 三 🂝
Regards,	
Joe	

2. At the Send for Review window, select the required reviewer, enter a **due b**y date and any comments and click **OK**.

The Contractor Group) x		
o Insert		▼ ○ Replace Tex
•	Respond by message:	▼ Respond by date:
$ {} \mathbb{H} \mid = 0 : (\mathbf{a} \cdot \mathbf{a} \mid \mathbf{B} \mathcal{I} \underline{\mathbf{I}} \mid \mathbf{x}^* \times_{\mathbf{c}} \mathbf{A} \star \otimes_{\mathbf{b}} \star $	Send for Review	
	Reviewer * : Select a reviewer Due by * : 26-11-2019	OK Cancel

- 3. An email notification is automatically sent to the reviewer and the transmittal is listed in the Drafts folder of the reviewer and originator until sent. The originator cannot send the transmittal while under review, however, they can open the draft and select **Cancel Review** at any time if required.
- 4. The reviewer is notified by email that they have a draft for review. They can access it via the email hyperlink, Drafts mailbox under Transmittals or via the dashboard **To Review** links found within the My Statistics or Transmittal widgets.

									Refres
💼 Ti	asks		¢ ^	•	My	y Stat	tistics		\$ ^
	5	All tasks allocated	2 overdue	Þ		13	New mail		
	0	To be completed today		Þ		96	Inbox items with status "OUTSTANDING"		
	2	High priority	1 overdu	Þ		2	To review		
	2	Tasks with status "NEW"				0	Returned from review		
	0	Tasks with status "IN PROGRESS"					Mail 🔲	Document 🔲	Transmittal 🔲
		Incoming Tasks 🗖	Outgoing Tasks 🔲						
				- \$	Tr	ansn	nittals		\$ ^
× M	ail		2 ^			28	Total sent		
Þ	13	New mail				11	Total received		
Þ	18	Inbox items awaiting response	18 overdue	IC		1	To review		
Þ	4	Sent items awaiting response	4 overdue	17		0	Returned from review		
·	2	To review				26	Sent with an acknowledgement pending		
Þ		Returned from review				23	Sent with a response outstanding		23 overdue
	0								

5. When the transmittal under review is opened a "Transmittal for Review" window opens first. Click **OK** once the request details have been read.

Send 💌 Save Print Previ	ew Clo	se	More Add Documents	Attach Files							
To Adrian Hinkley	(Engineer	ing Proj	iect Services) ×								
Cc											
Subject: Updates to supe	rseded doo	uments									
Text Input: Select Tex	t to Insert										
eason for Issue: Issued As Requ	ested			•	Transmitta Originated	I for Review					
Arial, Arial_M 🔹 13px 🔹	A 5	- (°	$\mathbb{B} I \mathbb{I} \mathbf{X}^2 \times_2 \mathbf{A}$	• 💩 • 🧕 🛊 🕯	By:	oreg namoon					
Dear Adrian,					Requested By:	Greg Harrison					
Latest documents attached. Plea	se remov	e the co	prresponding superseded ver	sions.	Due by:	29-11-19					
egards,					Comments:						
					Date	Name	From Com	bany	Con	nments	
Greg Harrison					28-11-2019	Greg Harrison	Houston Co	ontracting	No	Comments available	
Greg Harrison					28-11-2019	Greg Harrison	Houston Ci	ontracting	No	Comments available	OK
3.Documents	amove Se	lected			28-11-2019						ОК
3 Documents move All R	emove Se Rev	lected Sts	Title	Disc	28-11-2019	Downloa	d Alli Doy DWG	wnload sel	ected files OTHER		ОК
3 Documents move All R Document No.	Rev	Sts				Downlos PDF ØF	d All Doy DWG	wnload sel DOC	ected files OTHER Ø	Include comment	
3.Documents			Title Floor Plan 2nd Floor Plan	Disc		Downloa	d Aliji Dov DWG	wnload sel	ected files OTHER	Include comment	ОК

- The reviewer can make revisions and keep the transmittal in review (return it to the originator or send to another reviewer) using the arrow next to the Send button and selecting Send for Review.
- 7. If sent back to the originator as a draft, they are notified the review is complete and see a **Returned from Review** link within the "My Statistics" and "Transmittal" widgets within the

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	Dashbo	ard								Refr
	▶ 4	To review								
	0	Returned from review							Type 🔲	Phase 📃
	▶ 84	Inbox items with status	"CLOSED-OUT"		_					
	More		Personal 🔲	Company 🔲	iT 🗇	ransm	nittals			\$.
						210	Total sent			
	Docun	nents		2 ^		13	Total received			
	16	[Empty]				0	To review			
	862					0				
	21	Manual				189	Sent with an acknow	edgemer	t pending	
<	13	Photograph				113	Sent with a response	outstand	ling	113 overdue
	4	Register						Pe	ersonal 🔲	Company 📃
1	18	Report								
	More				📄 Pr	oject	Description			¢ -
	т	ype 🔲 🛛 Discipline 🛛	Status	Review Status 📃			_			
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	Work	flow		2 ^					ոլի	
	4	To Review		4 overdue						
	<	Dashbor 4 0 84 More Docun 16 862 21 13 4 18 More T	0 Returned from review 84 Inbox items with status More Inbox items with status Image: Documents Image: Documents 16 [Empty] 862 Drawing 21 Manual 13 Photograph 4 Register 18 Report More Type Discipline Workflow Discipline Discipline	Dashboard • 4 To review • 0 Returned from review • 84 Inbox items with status "CLOSED-OUT" More Personal • • Documents • • 16 [Empty] 862 Drawing 21 21 Manual 13 13 Photograph 4 4 Register 18 18 Report More Type Discipline Status	Dashboard 4 To review 0 Returned from review 84 Inbox items with status "CLOSED-OUT" More Personal Company © Documents Company Company 16 [Empty] 862 13 Photograph 4 Register 18 Report More Type Discipline Status Review Status	Dashboard 4 To review 0 Returned from review 84 Inbox items with status "CLOSED-OUT" More Personal Company © Documents 2 ^ 16 [Empty] 862 Drawing 21 Manual 13 Photograph 4 Register 18 Report More Type Usicpline Status Review Status * ^	Dashboard 4 To review 0 Returned from review 84 Inbox items with status "CLOSED-OUT" More Personal Company Company Company Company Company Company Project Transmitted and the status a	Dashboard 4 To review 0 Returned from review 84 Inbox items with status "CLOSED-OUT" More Personal Company Documents 13 Total received 0 To review 0 Returned from review 13 Photograph 4 Register 18 Report Type Discipline Status Review Status Workflow A workflow Workflow A workflow 	Dashboard 4 To review 0 Returned from review 84 Inbox items with status "CLOSED-OUT" More Personal Company Documents Company 13 Total received 0 To review 0 Returned from review 13 Total received 0 To review 0 Returned from review 13 Potograph 4 Register 13 Report More Type Discipline Status Review Status Project Description 	Dashboard 4 To review 0 Returned from review 84 Inbox items with status "CLOSED-OUT" More Personal Company Type Total sent 210 Total sent 210 Total sent 3 Total received 0 To review 0 Returned from review 0 Returned from review 13 Photograph 4 Register 18 Report More Type Discipline Status Review Status Project Description

Dashboard. They will see all reviewer comments and can make any further changes if required.

8. If the transmittal is ready to send to the final recipient, the reviewer can click **Send** (in which case the Sender details on the transmittal will change to the reviewer rather than the originator). The Originator will be sent a notification advising them the reviewed transmittal has been sent.

NOTE

- Notifications are sent to the reviewers once the transmittal has been sent.
- It is possible to track "Review Due Date", "Review Start Date" and "Current Reviewer" by adding these columns to the grid in the Transmittals Draft register using the **Customize** option from the **More** button list of options.
- It is possible to download the documents listed on a transmittal that is being reviewed using the **Download All** or **Download Selected Files** options.

CHAPTER 3 – RESPONDING TO TRANSMITTALS

To respond to a transmittal:

- 1. From the left menu, click **Transmittals** then **Inbox**.
- 2. From within the Inbox, select the transmittal item by double clicking on it or ticking the box next to it and selecting the **Reply**, or **Reply All** buttons on the toolbar then choose a mail type, if available.

	Re	eply 🔻 Reply All	 Forward 	Refresh Print	Export 💌 More 💌
Dashboard		🛛 Transmittal No.	Received 🗸	Package	Subject
		T	dd-mm-yyyy 🎟	T	T
Mail		TRAINING50202	2 07-10-19 01:24 PM		Transmitted
		TRAINING50202	2 03-10-19 01:28 PM		Transmitted
Documents		TRAINING50201	12-09-19 04:00 PM		Transmittee
Transmittals		TRAINING50201	12-09-19 03:57 PM		Transmittee
		TRAINING50201	12-09-19 03:55 PM		Transmittee
nbox		TRAINING50201	12-09-19 03:06 PM		Transmitted
orafts		TRAINING50200) 14-06-19 08:52 AM		Transmittal
Sent Items		HCC-000098	05-06-19 06:27 AM		Documents
Pending		HCC-000071	17-01-19 09:14 AM		Elevation D

3. Proceed as normal for creating outgoing mail, then click **Send**.

NOTE

- The transmittals Inbox also stores all notifications received from other users via the Packages module.
- Replies are automatically linked to the original transmittal.
- Incoming transmittals are display in bold until they are opened. They can also be marked as read / un-read right clicking on the transmittal entry.
- Based on user access, a transmittal will be marked as read if at least one recipient within the company/department has opened the transmittal.
- Based on user access if there are multiple recipients from a company/department on the transmittal, by default only one instance of the transmittal will show in the Inbox (own if the recipient, otherwise the first recipients entry). Use the Show duplicate company transmittals option to see all entries – including read/un-read status.
- Track outstanding responses to transmittals via the Transmittals Widget at the Dashboard for responses outstanding and responses overdue.
- To indicate that a recipient has responded to a transmittal, update the Response date via the Transmittals – Sent Items Register either at a Transmittal or Recipient level.

CHAPTER 4 – LOCATING TRANSMITTALS

4.1 Simple Search Options	21
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4.1 SIMPLE SEARCH OPTIONS

Use the Quick Search box above the transmittal register. Enter a string of text and click Go.
 Once finished click the Clear link to remove the active search filter or click Default to return to the user's default view.

	✓ Š ■	Search	ts 🖌 🔟 Reports
	Search all Inb	Go Advanced	Saved 🔲 📄 Personal
Subject	Message	From	From Company
T		T	Y
Notification of Package Issue, Reason: Is	sued Hi team, Please refer to the structur	ral documents Joe Fredericks	Houston Contracting
Structural Docuemnts	Hi, Please refer to the latest rev	ision of strue John Smith	Houston Contracting
Structural Docuennits			Ender the Destruction for the
PDF files Merge		Frank Jacobs	Engineering Project Services

2. Use column filters by entering a text string into the box in the column header and click the icon to the right of the box to choose the filter type. Use the **Clear** link to remove the search filter.

nbox - Contains 'drawing'	Clear drawing	Go Advanced Saved	🔲 🔲 Personal
Reply 🔹 Reply All 💌 Forward 💌 Refresh Print Export 💌 More 💌			
l g Transmittal No. Received	Message	From	From Company
T dd-mm-yyyy 🗐 T	T	T	T
HCC-000071 17-01-19 09:14 AM Elevation Drawing	John attached is the elevat	ion drawing you reque: Joe Frederic	ks Houston Contractir

4.2 ADVANCED TRANSMITTAL SEARCH

The **Advanced** Transmittal Search screen enables structured and intelligent searching via any of the key data fields relating to the Transmittal folder you are currently using.

Heading	Options
Addressed To / Sent By:	Defaults to Personal Transmittals but can be modified to include any transmittals sent or received by your company or department based on access settings.
То:	Select a Company or Person from the drop down list.
From:	Select a Company or Person from the drop down list.
Туре:	Choose between the various transmittal types. Note that Package Notifications are also considered as transmittal types for the purpose of filtering.
Date Sent / Date Received:	Search for transmittals sent during a specific date range or for transmittals sent in the last X days.
Responses Requested:	Search for transmittals which require a response during the specified date range or within the next X days.
Responses Received: (Sent register only)	Search for transmittals which responses were received during the specified date range or within the next X days.
Responses:	Choose between: - All - Outstanding - Overdue
Transmittal No.	Search by transmittal number or part thereof.
Acknowledgement Received: (Sent register only)	Search for transmittals where acknowledgement was received during the specified date range or within the next X days.
Message:	Search across the body text of all transmittals for a string of text.
Reason for issue:	Select a search condition such as "Contains", or "Begins with" and enter the search text string in the field provided.
Package ID:	Search by package number or part thereof.
Document No:	Search by document number or part thereof.
Subject:	Select a search condition such as "Contains", or "Begins with" and enter the search text string in the field provided.

Heading	5	Options
Sort by:		Select an option from the list. Choose between Ascending and Descending order. Up to three sort fields can be combined using the More button.
More Search Options:		The More Search options link allows you to create your own search conditions using most of the fields in the transmittal register, several comparison conditions and open text fields.
NOTE	set	save advanced search settings, click Save and enter a Title for the saved tings. You can then use the Manage button to load a previously saved search or the Saved button at the top of the transmittal registers.
	act list	share the current view of the Transmittal register with an Advanced search ive, select Generate Hyperlink for the current register from the More button of options. Then choose Copy to Clipboard and paste as required. Results ered using quick search or column filters will not be included in this link.

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CHAPTER 5 – MANAGING TRANSMITTALS

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5.1 PENDING TRANSMITTALS

When documents are transmitted, the sender can choose to automatically notify recipients of future revisions. If this option is selected, when new revisions of transmitted documents are processed into InEight Document and released, the recipient will be notified automatically.

If this option is not selected, the user will not be notified automatically about revisions to documents transmitted to them. In this case awareness of document revisions that have been released and not transmitted to recipients who were transmitted the previous revision is required. This is managed in InEight Document via Pending Transmittals.

To check Pending Transmittals:

1. From Transmittals, go to Pending.

■ New	Pending	
	Refresh Print	
Dashboard	Name	Company
Dashboard	Adrian Hinkley	Engineering Project Services
	Dovakin Windhelm	Houston Contracting
🖾 Mail	Frank Jacobs	Engineering Project Services
	George Robinson	Engineering Project Services
Documents	Gina Joseph	Houston Contracting
	Greg Harrison	Houston Contracting
Transmittals	Ian Doyle	1M Consulting
	Ineight Australia	1M Consulting
Inbox	Joe Fredericks	Houston Contracting
Drafts	John Morley	Morley Plumbing Services
Sent Items	John Smith	Houston Contracting
Pending	Josephine Milio	1M Consulting
Pending	Jo Vittiglia	TeamBinder Training
# Packages	Katherine Hilbert	Decmil

2. The default view is **By Recipient**, this shows a list of Recipients in the upper window who have superseded documents.

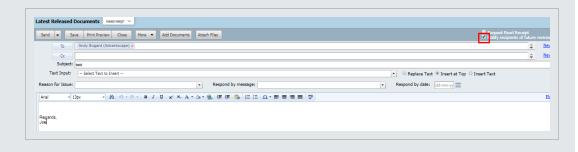
Refresh Print					Show Igr	nored	Search all Recipients	;	Go 🔲 🔳	By Recipient	
Name 🔺	Company										
David Cheah	QA Software Pt	y Ltd									
Frank Jacobs	Engineering Pro	oject Services									
ake Solid	Solid Builders A	ustralia									
am Wells	Wells Engineeri	ng									
imone W	Solid Builders A	ustralia									
Theo Wells	Wells Engineeri	ng	3								
Jser 1	Training Compa	any									
lser 2	Training Compa	any									
Valter Inkwell	Sir Speedy Print	tina									
	,										
Items: 9	e size: 100 🔻	Refresh		_						9 items in	1 pages
Items: 9 Create Pending Transmitta	e size: 100 💌	Refresh	StsSent	Title	Disc	Cat					
Items: 9	e size: 100 🔻	Refresh ts RevSent	StsSent IFI	Title Floor Plan	Disc	Cat	_			9 items in Ignor	

- 3. Click on a recipient. The lower part of the window will show the document(s) revision transmitted to the recipient and the current revision available (not transmitted).
- 4. To remove a document from the pending list (if the recipient does not require later revisions of a document transmitted to them), click the **Ignore** box.
- 5. Change the view by using the View by Document option at the top right. This shows documents

previously transmitted and now revised in the upper window with the recipients listed in the lower part.

Search all Documents	Go 🔲 🔲 By Document
----------------------	--------------------

• Pending transmittals are created even if the option to **Notify recipients of future revisions automatically** is ticked when generating transmittals. The recipient will still receive an automatic notification about the revised documents, however, there may be a requirement to formally transmit them.

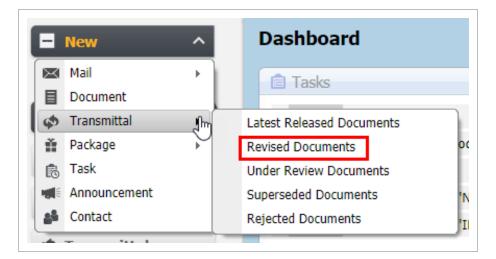


• Pending transmittal visibility is based on access settings.

5.2 TRANSMITTING REVISED DOCUMENTS

To transmit Revised Documents using the Pending Transmittal concept:

1. Click New, select Transmittals then Latest Revised Documents.



- 2. Select the **Recipients**. Only recipients from pending transmittals who have not been notified about revisions to documents they previously received via transmittal will be displayed.
- 3. Choose to Notify recipients of future revisions automatically (if applicable).

To Diana Scul	ly (Brookland City Council) ×	Notify recipients of future revisions automatication
Subject:		New Conta
Reason for Issue:	Respond by message:	Respond by date: 02-12-19
Arial • 13px	- 品 約 · ○ · B J 世 x' × A · ③ · ⑧ 律 書	Į 🖏 j≘ Ε Ω • Ε Ξ Ξ 🗮 🍄 Plain Text

- 4. Click the Add Documents button.
- 5. Only revised documents that are un-restrained or have been released which the select recipient has not yet been notified about will be listed.
- 6. Complete the transmittal as per normal then click Send.
- Initiate a transmittal of revised documents using **Create Pending Transmittals** within the Pending transmittals screen.
 - Documents that have **Ignore** ticked via Pending Transmittals can be displayed by un-ticking **Hide Ignored**, these will then be displayed in grey and selected if required.

5.3 ACKNOWLEDGEMENTS

InEight Document tracks and maintains a history of every transmittal sent and every document downloaded by recipients from transmittals. The system also tracks and maintains a history of transmittal acknowledgements and responses.

Historically, a Transmittal Acknowledgement is a signed copy of a transmittal returned by the recipient to the originator of the transmittal to acknowledge receipt of the transmittal and the drawings or documents it contains.

Within InEight Document, however, acknowledgements are updated automatically if the recipient chooses to send an acknowledgement as prompted when downloading the documents from the

transmittal. If they click **Yes** to this prompt the transmittal will be updated at a recipient level as acknowledged automatically.

Transmittal acknowledgements can also be updated manually via the Transmittal – Sent Items register at either a Transmittal or Recipient level.

To update acknowledgements manually:

- 1. From the left menu click **Transmittals** then **Sent Items**.
- 2. Double click on the transmittal number to open the detailed view.
- 3. To view a list of documents on a transmittal, click on the Documents tab.

• · ·		of - fransmittal: TKA	NING	501000	344 - Electrical Document	ation - G	loogie ch	rome								-	×
i	Not sec	ure teambinder.	:om/	TeamB	inder 19920/Transmitta	al/tbTra	nsmittal	Detail.asp:	x?Box=2&IntTr	mtl=1	025&SF	owThre	ad=0&t	cKey=ca	5fb725-2c86-4	1e9-a140-f80760c073dd#	(
		umentation															
rom		ericks, Houston Contracti	-		ittal No.: TRAINING50100034			_									
Reply	/ 💌 Reph	All 🔹 Duplicate 🔹	Resend	Canc	el Print Save changes	More	 Close 	se									
Me	issage	Documents Recipients															
A	19 9 1	Document No. 🔺	Rev	Sts	Tide	Disc	Cat	Туре	Review Status	Tasks	PDF	DWG	DOC	OTHER	Include comment		
		T		•	T		•	•	•							T	
0		030819-001	в	IFI	Site Plan	ELEC		MAN	Un-Restrained								
1	Q	10092019-DOC-002	A	IFI	Elec Doc Registration 001	ELEC		REPORT	Un-Restrained					×.			
)	R.	10092019-DOC-003	Α	IFI	Elec Doc 003	ELEC		REPORT	Un-Restrained					×.			
0	🖻 💼	ADV-EE-20190301-01-PA	С	IFI	Single Line Diagram	ELEC		DRAWING	Un-Restrained			8					
	🖻 🗎	ADV-EE-20190306-01-PA	в	IFI	Electrical Specification 607 Build	ir ELEC		SPEC	Un-Restrained					×.			
0	🖹 🗎	E-G-L-0001	G	IFI	1st Floor Electrical Layout	ELEC	L1	DRAWING	Un-Restrained		1						
	E.	E-G-L-0002	С	IFT	2nd Floor Electrical Layout	ELEC	CLUB	DRAWING	Released		P						
	R.	ELEC-DRAWING-001	Α	IFI	Electrical Schematic	ELEC		DRAWING	Un-Restrained		1						
	2	EPS-TR-20190305-01-PA	в	IFI	Single Line Diagram	ELEC		DRAWING	Un-Restrained					×			
	R.	IE-TR-230120199-PA	Α	IFI	Site Plan	ELEC	EXT	DRAWING	Un-Restrained		1						
		IE-TR-23012019-PA	A	IFI	Site Plan	ELEC	EXT	DRAWING	Un-Restrained		1						
	R.	IE-TR-2301-PA	Α	IFI	Site Plan	ELEC	EXT	DRAWING	Un-Restrained		1						
	E.	IE-TR-2401-01-PA	Α	IFI	Site Plan	ELEC	EXT		Un-Restrained		1						
	2	IE-TR-25012019-0116-PA	A	IFI	Site Plan	ELEC	EXT	DRAWING	Un-Restrained		1						
	🛒 🖻	IE-TR-25012019-PA	в	IFR	Site Plan	ELEC	EXT	DRAWING	Released		×						

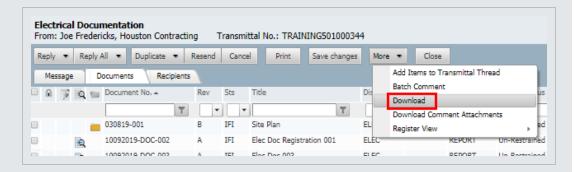
4. To update the **Acknowledgement** and/or **Response Date** at a Transmittal level, at the Message tab enter the dates in the fields provided at the bottom of the screen.

10	IE-TR-230120199-PA	A	IFI	Site Plan
11	IE-TR-23012019-PA	A	IFI	Site Plan
12	IE-TR-2301-PA	A	IFI	Site Plan
13	IE-TR-2401-01-PA	A	IFI	Site Plan
14	IE-TR-25012019-0116-PA	A	IFI	Site Plan
15	IE-TR-25012019-PA	в	IFR	Site Plan
16	T-HV-D-00001	A	IFI	High Voltage Electrical Outline Level 1
17	T-HV-D-00002	С	IFI	High Voltage Electrical Outline Level 2
18	T-HV-D-00003	с	IFI	High Voltage Plan Electrical Penthouse Lvl
19	T-HV-D-00004	A	IFI	Layout for High Voltage Electrical Basement Leve
20	T-HV-D-00005	D	IFI	High Voltage Electrical Outline Level 1
21	T-HV-D-00007	с	IFI	High Voltage Electrical Outline Level 2
22	T-HV-D-00008	A	IFI	High Voltage Electrical Plan, page 2 Level 1 - nort
23	T-HV-D-00009	A	IFI	High Voltage Electrical Outline Level 1 - south qua
24	T-HV-D-00010	A	IFI	High Voltage Electrical plan - Fire and Security
25	T-HV-D-00012	в	IFI	High Voltage Electrical shop drawing - Fire and Se
26	T-LV-D-00006	в	IFI	Low Voltage Electrical Outline Level 1
27	T-LV-D-00007	D	IFI	Low Voltage Level 2 Electrical Outline
28	TR-0001-010419-PS	A	IFI	Site Plan
29	TR-001-NEX-AT	A	IFI	Testing
30	TR-15072019-PS	A	IFI	Site Plan

To update the **Acknowledgement** and/or **Response Date** at a Recipient level, click on the **Recipients** tab and enter the dates in the fields provided against each recipient as required.

Reply Reply All - D	Duplicate • Resend	Cancel	Print	Save char	naes	More •	Close
Message Documents	Recipients						
mpany 🔺	Name	Ackno	wledgment R	leceived	Respo	nse Receive	d
T		T dd-m	т-уууу 🎟	T	dd-mr	п-уууу 🎟	T
B WWCD	Master User						
B WWCD	User A251119			1111			
B WWCD	User B251119						
B WWCD	User C251119			11111			1111

• To download documents, from the transmittal in the detailed view, click on the **Documents** tab then select the documents to download, from **More** select **Download**.



- On some projects it is possible to bulk print the view files related to the transmittal from the documents tab. This feature must be enabled by InEight contact your account manager.
- Users with Company or Department Level access to transmittals and Send access to the transmittal type can update the Acknowledgement or Response received dates; Cancel a Transmittal; and/or Resend a transmittal on behalf of other users in the same Company or Department.
- If a user is not the recipient or sender of a transmittal, while with company access to transmittals they may be able to view the transmittal, normally they cannot download the documents on the transmittal unless they already have access via other means.

5.4 DUPLICATE TRANSMITTALS

To duplicate a transmittal:

- 1. From the left menu click **Transmittals** then **Sent Items**.
- 2. Open the Transmittal by double clicking on it.
- 3. Click the **Duplicate** button, chose to **Duplicate with Recipients** or **Duplicate without**

Recipients.

Notification of Document Transmittal From: Joe Fredericks, Houston Contracting Transmittal	No.: TRAINING5010003	45				
Reply Reply All Duplicate Resend Cancel	Print Save change	s More 💌	Close			
Message Documents Duplicate without recipients						
Duplicate with recipients			_			
No attachments						
	_				ПС	ſſ
	Documen	t Transm	nittal			U
	Project Number:	TRAINING501			Transmittal No: TRAINING501000345	
	Project Title: Date:	InEight Documer 25 November 20				
	Date: Reason for Issue:	25 November 20	J19, 11:45:49 Af	M +05:30		
	Subject:	Notification of De	ocument Transr	nittal		
	Message:					
	Regards,					
	Joe					
	Transmitted To:				1	,
	Company				Name	
	The Contractor Group				Bob Johnson	l
	Click here to download	all Transmittal files.				
	Click on Document Nos	to download them i	individually.			
	Item Document No		Rev	Sts	Title	1
	1 <u>01.01</u>		D	IFC	Level 3 Fire Saftey Design	
	Transmitted by: Joe Fi	redericks, Houston (Contracting			
	Generated by TeamBinder (2001-2019 OA Selar	we Div Ltd			
	Generative by realitorities	e zoo nizo na Greadiane	and in sy call			

4. Complete the transmittal then Send.

• The duplicate option is also found in Sent Items register. Select the transmittal then under **More**, choose **Duplicate** (with or without recipients).

 If one or more of the documents on the transmittal being duplicated have been superseded, the user will be prompted to choose between sending the latest or superseded revision of documents.

5.5 RESEND TRANSMITTALS

To resend a transmittal:

- 1. From the left menu click **Transmittals** then **Sent Items**.
- 2. Open the Transmittal by double clicking.
- 3. Click the Resend button.

ment Transmittal Houston Contracting Transmittal No.: TRAIN	IING501000345				
Duplicate Resend Cancel Print	Save changes More C	ose			
	_				
Doc	ument Transmi	ttal		LCC	
Project N Project T Date: Reason f Subject: Message	itle: InEight Document 25 November 201 or Issue: Notification of Doc	9, 11:45:49 AM	+05:30	Transmittal No: TRAINING501000345	
Regards, Joe Transmitt	ied To:				
Compan	-			Name	
The Cont	tractor Group			Bob Johnson	
	to download all Transmittal files. Nocument Nos to download them in	dividually.			
Item D	ocument No	Rev	Sts	Title	
1 01	1.0 <u>1</u>	D	IFC	Level 3 Fire Saftey Design	
	ted by: Joe Fredericks, Houston C	-			

4. Select the recipients you wish to resend the transmittal to then click the **Resend** button.

NOTE Transmittals can only be re-sent by the user who created them or other users within the same company/department based on access settings.

5.6 CANCELLING A TRANSMITTAL

To cancel a transmittal that has been sent:

1. From the left menu click Transmittals then Sent Items.

2. At the transmittal register, select the Transmittal then click Cancel.

New Y	Se	nt Items						
		Cancel Reply 💌	Reply	All 🔹 Forward 📼	Refresh Print	Export	• More •	
Dashboard		Transmittal No.	T	Sent - dd-mm-yyyy IIII	Package	T	Subject	
8 Mail		TRAINING5010003 HCC-000409	45	25-11-19 11:45 AM 25-11-19 06:07 AM	CIVDOC			Document Transmittal Addendum to Package
Documents		HCC-000408		25-11-19 06:03 AM	CPBWWCD-1234		Notification of	Package Issue, Reason: Issued for Cor
Transmittals		TRAINING5010003 TRAINING5010003		25-11-19 05:46 AM 20-11-19 12:39 PM			Electrical Docu Notification of	mentation Document Transmittal
Inbox		HCC-000407		20-11-19 07:54 AM	TR-0001-20181018-0	1	Notification of	Addendum to Package
Drafts		HCC-000406		20-11-19 07:37 AM	LE-STRUC-20192011		Notification of	Package Issue, Reason: Issued for Info
Sent Items		HCC-000405		15-11-19 05:54 AM	TH-HCC-151119		Notification of	Package Issue, Reason: Issued for Is
Sent Items		TRAINING5010003	41	15-11-19 05:46 AM			Civil document	15

3. At the Cancel Transmittals window enter a **Reason** for cancelling the transmittal. If the reason is the same for all transmittals being cancelled, tick the **Apply same reason to selected transmittals**.

Cancel Transmittal	5						
The following transmit	tals were selected to	be cancelled	d. Enter the	Reason as to why they are to	be cancelled	н.	
🛃 Transmittal No.	Sent	Documents	Recipients	Reason*		_	
✓ TRAINING50100034	25-11-19 05:46 AM	Documents	Recipients		~	Apply same reason to selected transmittals	

4. Recipients of the transmittal being cancelled will be notified via the option **Notify the transmittal recipients that the selected transmittals have been cancelled**.

he	following transmit	tals were selected to	be cancelled	d. Enter the	Reason as to why they a	re to be cancelled	
1	Transmittal No.	Sent	Documents	Recipients	Reason*		
1	TRAINING50100034	25-11-19 05:46 AM	Documents	Recipients		•	Apply same reason to selected transmittals
							_

5. Click OK.

- The cancelled by, cancelled on and cancelled reason is shown in the detailed view of the cancelled transmittal.
 - Transmittals can only be cancelled by the user who created them or other users within the same company/department based on access settings.

5.7 EXPORTING TRANSMITTALS TO HTML OR PDF

Transmittals stored in the Sent Items or Inbox registers can exported to HTML or PDF format as a single zip file.

To export transmittals:

- 1. Select one or more transmittals to be exported by ticking the select boxes against them.
- 2. Click the Export , Selected Transmittals and then select from HTML or PDF.

G	ancel Reply • Reply	All 🔹 Forward 🔹	Refresh Print E	xport 💌 More 💌
١,	Transmittal No.	Sent +	Package	Excel >
	T	dd-mm-yyyy 🏢 🍸	7	Selected Transmittals
	TRAINING501000345	25-11-19 11:45 AM		Notification of Document Tra
	HCC-000409	25-11-19 06:07 AM	CIVDOC	Notification of Addendum to Package
	HCC-000408	25-11-19 06:03 AM	CPBWWCD-1234	Notification of Package Issue, Reason: Issued for Construction
	TRAINING501000344	25-11-19 05:46 AM		Electrical Documentation
	TRAINING501000342	20-11-19 12:39 PM		Notification of Document Transmittal
	HCC-000407	20-11-19 07:54 AM	TR-0001-20181018-01	Notification of Addendum to Package
	HCC-000406	20-11-19 07:37 AM	LE-STRUC-20192011	Notification of Package Issue. Reason: Issued for Information
	HCC-000405	15-11-19 05:54 AM	TH-HCC-151119	Notification of Package Issue. Reason: Issued for Information
	TRAINING501000341	15-11-19 05:46 AM		Civil documents
0	HCC-000404	15-11-19 05:04 AM	ATE-STR-0001	Notification of Package Issue. Reason: Issued for Construction
	TRAINING501000340	15-11-19 04:50 AM		Hydraulic Documents
	HCC-000403	14-11-19 10:35 AM	ATE-PLUM-1234	Notification of Addendum to Package
	HCC-000402	14-11-19 10:24 AM	ATE-PLUM-1234	Notification of Package Issue. Reason: Issued for Construction

- 3. If the InEight Document privacy statement appears, click Yes to continue with the download.
- 4. The selected transmittals are zipped on the InEight Document server and downloaded to your PC.
- 5. Save the zip file containing the exported transmittals to the appropriate location.

NOTE

- The zipping process may take a few minutes if many transmittals are selected.
- A single transmittal being exported is not zipped.

5.8 FORWARDING A TRANSMITTAL

To forward a transmittal that has been sent:

- 1. From the left menu, click **Transmittals** and select either **Inbox** or **Sent Items**.
- 2. Select the transmittal to be forwarded then click **Forward**.

New Y	Inl	bo	x		
	R	ep	ly 🔹 Reply All 🔹 Forward 📼 Refre	esh	Print Export More
Dashboard		0	Transmittal No.		Received - Package
			T		dd-mm-yyyy 🏢 🍸
3 Mail			HCC-000406		20-11-19 07:37 AM LE-STRUC-20192011
	1		TRAINING501000287		18-10-19 07:45 AM
Documents			TRAINING501000258		02-10-19 05:31 AM
			TRAINING501000223		19-09-19 07:29 AM
Transmittals		8	TRAINING501000152		13-08-19 05:00 AM
Inbox		8	TRAINING501000151		13-08-19 04:59 AM
Drafts			TRAINING501000109		02-08-19 09:24 AM
Sent Items			TRAINING501000001		14-06-19 08:44 AM
Pending			HCC-000285		11-06-19 02:25 PM TEST_PACKAGE
-			HCC-000283		10-06-19 08:32 AM
Packages		8	HCC-000273		27-05-19 07:08 AM

- 3. Complete the transmittal as per normal.
- 4. Click the Send button.

NOTE	• All details from the transmittal selected, other than the recipients, will be included in the new transmittal.
	 If any of the documents on the transmittal being forwarded have been superseded, a prompt will appear for action.
	 The Subject of the new transmittal is prefixed with "Fw:"
	 The transmittal being forwarded and the new transmittal will be auto linked and shown in the thread view.
	 The details section of the new transmittal will be populated with the source transmittal details. You can Bulk Forward transmittals of the same type by selecting the Transmittals then from the arrow next to Forward choose Bulk Forward.