



**TRANSMITTALS USER
GUIDE**

DOCUMENT MANAGEMENT

INEIGHT 

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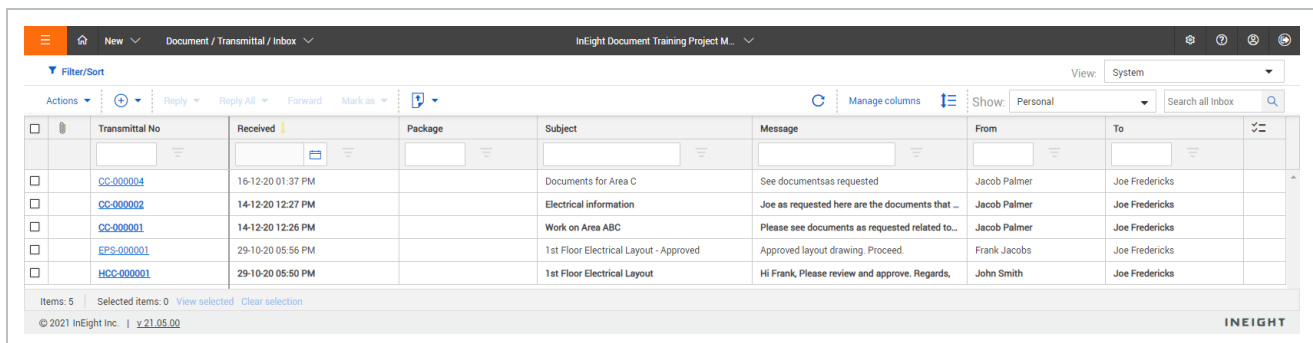
CHAPTER 1 – USING THE TRANSMITTALS REGISTER

Transmittals are used to issue documents to recipient(s) using links. 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.

For more information on using the Transmittals Register, see the links below.

1.1 VIEWING THE TRANSMITTALS REGISTER

The transmittal module includes an **Inbox**, **Drafts**, **Sent Items** and **Pending** folders. If you have access, they can be found by selecting the transmittals module.



Transmittal No	Received	Package	Subject	Message	From	To
CC-000004	16-12-20 01:37 PM		Documents for Area C	See documents as requested	Jacob Palmer	Joe Fredericks
CC-000002	14-12-20 12:27 PM		Electrical information	Joe as requested here are the documents that ...	Jacob Palmer	Joe Fredericks
CC-000001	14-12-20 12:26 PM		Work on Area ABC	Please see documents as requested related to...	Jacob Palmer	Joe Fredericks
EPS-000001	29-10-20 05:56 PM		1st Floor Electrical Layout - Approved	Approved layout drawing. Proceed.	Frank Jacobs	Joe Fredericks
HCC-000001	29-10-20 05:50 PM		1st Floor Electrical Layout	Hi Frank, Please review and approve. Regards,	John Smith	Joe Fredericks

1.1.1 Types of transmittals

Latest Released Documents: Used to transmit the latest released revision of unrestrained documents.

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. The recipient list is normally restricted. A setting can be changed by an Administrator to allow for this Transmittal type to be sent to any recipient.

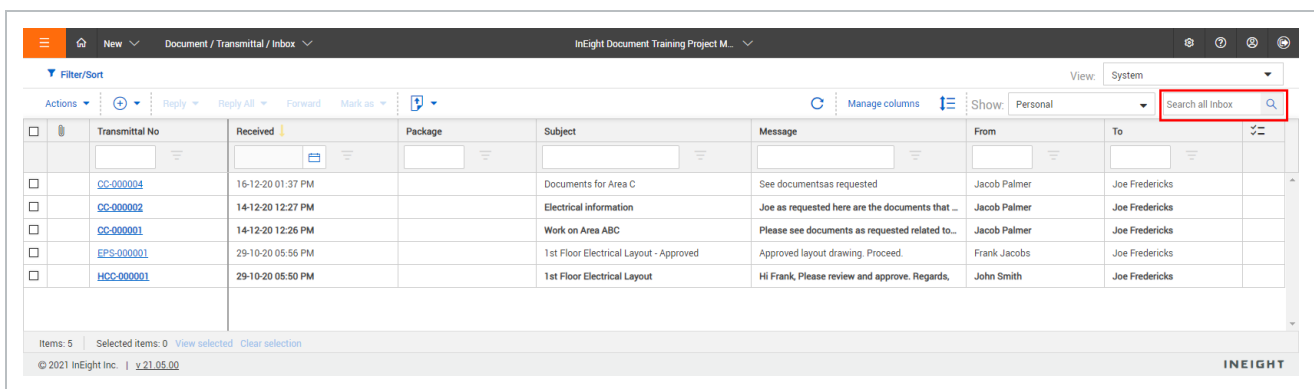
Superseded Documents: Used to distribute older revisions of documents.

Rejected Documents: Used to transmit documents that were Rejected through the Document review process. The recipient list is normally restricted. A setting can be changed by an Administrator to allow for this Transmittal type to be sent to any recipient.

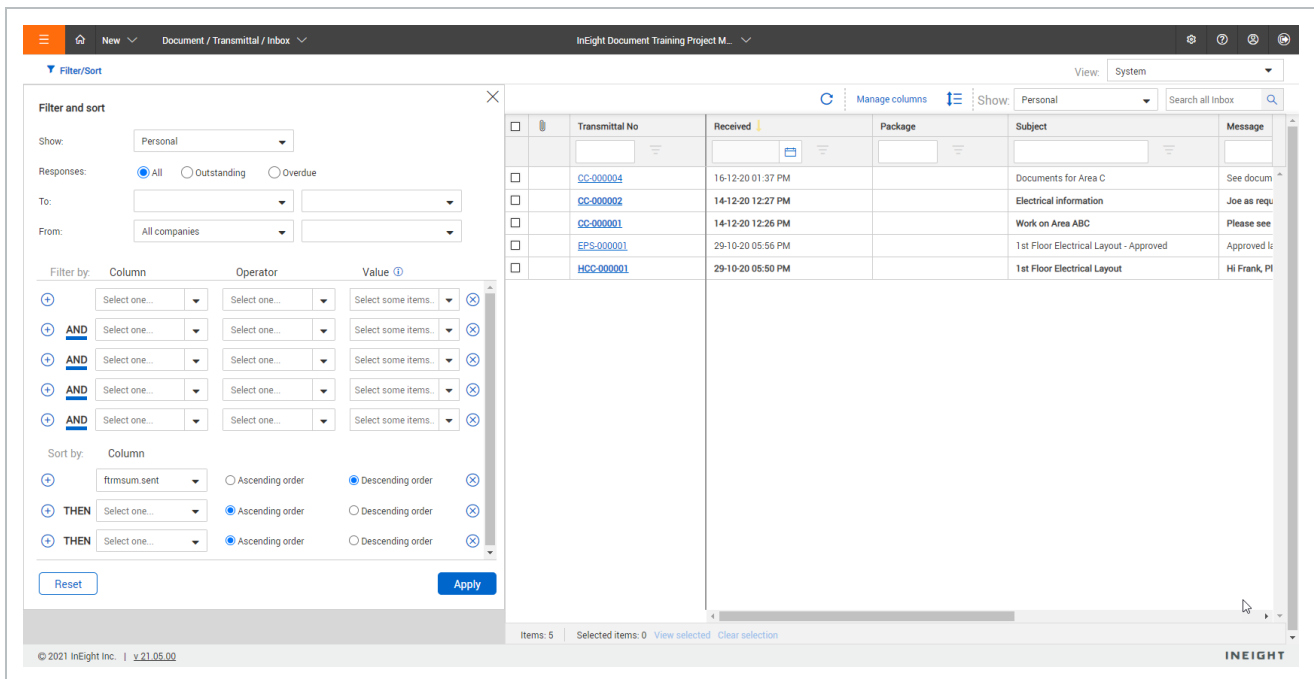
1.2 SEARCHING FOR TRANSMITTALS

There are three ways to search for transmittals in the Transmittals Register.

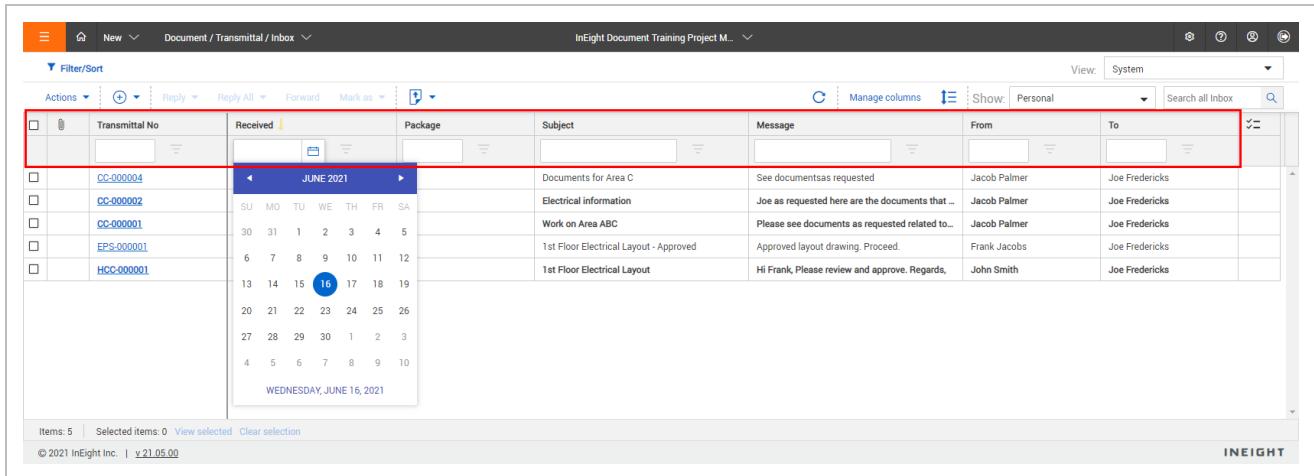
Simple search – Enter key words in the search box above the Register. The Register will display transmittals containing those key words.



Filter and sort – Click **Filter/Sort** to select filters for your search. Click **Apply** to apply the search filters.



Column filters – Enter key words into the columns above the Register or select the drop-down lists to apply filters to that column.



NOTE Share the current view of a transmittal register with a search applied to it by clicking **Actions** and selecting **Generate Hyperlink for the current register**.

1.3 CREATING AND SENDING TRANSMITTALS

There are multiple ways to generate transmittals using InEight Document, depending on your requirements.

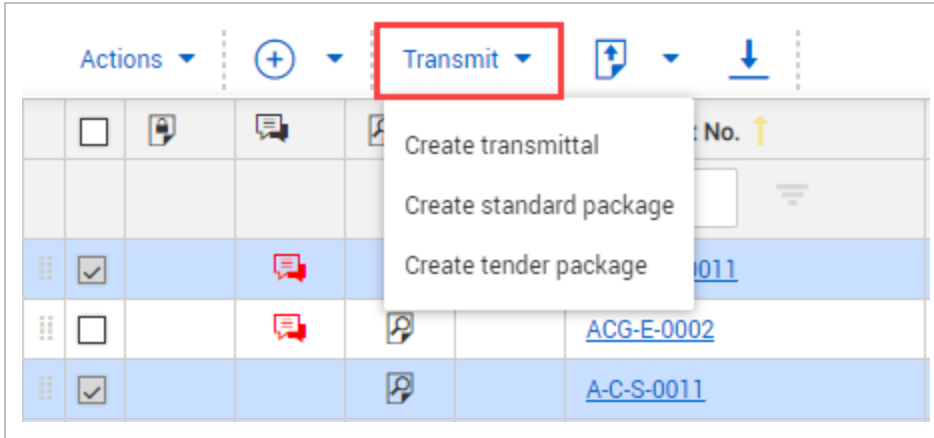
You are also prompted to create a transmittal each time you upload documents in bulk.

1.3 Step by Step 1 — Create a transmittal from the Documents register

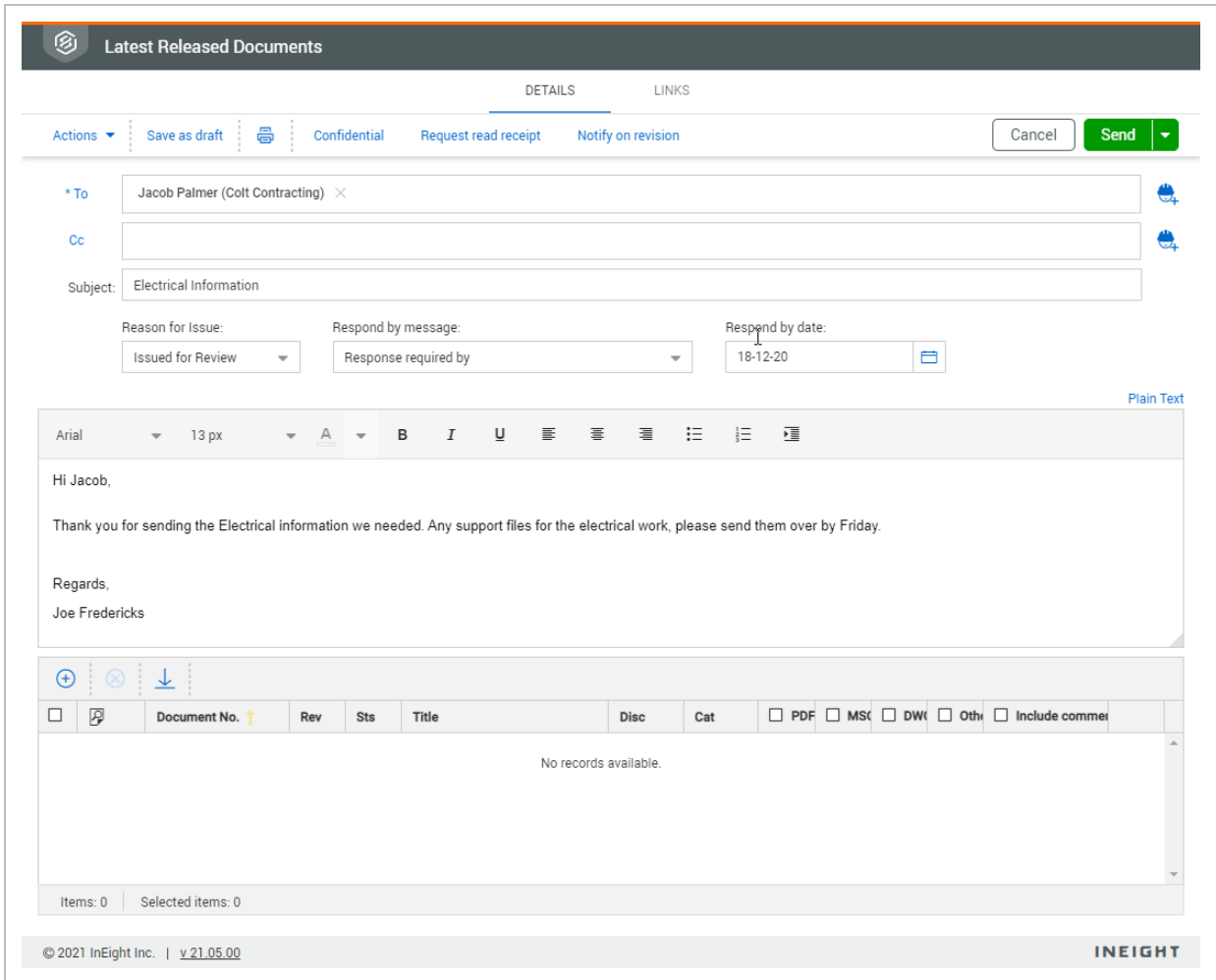
Create a transmittal from the Documents register to transmit document links to recipients.

1. From the Documents register, select the documents you want to transmit.

2. Click **Transmit**, and then select **Create transmittal**



3. Enter in the transmittal details.



- 4. You can click the **Add** icon in the documents section to add additional documents if needed.
- 5. Set the search criteria for the documents.

Add documents ×

Search criteria for Documents Hide search

Show:

Latest unrestrained Documents that I can download

Filter by:	Column	Operator	Value
+	Select one...	Select one...	Select some items.. ×
+	AND	Select one...	Select some items.. ×

Clear Search

Search results Show results

Cancel Add

6. Select the documents you want to add to the transmittal.

Add documents ✕

Search criteria for Documents Show search

Search results Hide results

<input type="checkbox"/>	DocumentNo ↑	R...	Sts	Title	Disc	Cat	PDF	MSO	DWG	Other	IncludeComm...
<input checked="" type="checkbox"/>	CC-L21-ELEC-D...	B	IFI	21st Floor Electrical Plan	ELE		<input checked="" type="checkbox"/>		<input type="checkbox"/>		
<input checked="" type="checkbox"/>	CC-L22-ELEC-D...	B	IFI	22nd Floor Electrical Plan	ELE		<input checked="" type="checkbox"/>		<input type="checkbox"/>		
<input type="checkbox"/>	CIV-I-DWG-001	A	IFI	Standard Details	CIV		<input type="checkbox"/>				
<input type="checkbox"/>	CIV-I-DWG-002	A	IFI	Bus Sheleter Layout Deta...	CIV		<input type="checkbox"/>				
<input type="checkbox"/>	CIV-I-DWG-003	A	IFI	Drain Details	CIV		<input type="checkbox"/>				
<input type="checkbox"/>	CIV-I-DWG-004	A	IFI	University Civil Details Sh...	CIV		<input type="checkbox"/>				
<input type="checkbox"/>	CIV-I-DWG-005	A	IFI	Car Park Civil Layout Sht 1	CIV		<input type="checkbox"/>				
<input type="checkbox"/>	CIV-I-DWG-006	A	IFI	Car Park Civil Layout Sht 2	CIV		<input type="checkbox"/>				
<input type="checkbox"/>	CIV-I-DWG-007	A	IFI	Fire Escape Footings	CIV		<input type="checkbox"/>				
<input type="checkbox"/>	CIV-I-DWG-008	A	IFI	Stair Footings	CIV		<input type="checkbox"/>				
<input type="checkbox"/>	CIV-I-DWG-009	A	AFC	Road Gradient Marshalls ...	CIV		<input type="checkbox"/>				

Items: 144 | Selected items: 2

Cancel Add


7. Click **Send**.

Electrical Information
From: Joe Fredericks, Houston Contracting Transmittal No: HCC-000012

MESSAGE DOCUMENTS RECIPIENTS ATTACHMENTS LINKS

Reply Reply all Resend Cancel

Acknowledgement Received: dd-mm-yy Responses Received: dd-mm-yy Cancel Save changes



Document Transmittal

Project Number: TRAINING504 **Transmittal No:** HCC-000012
Project Title: InEight Document Training Project Master
Date: 16 June 2021, 03:25:56 PM +10:00
Reason for Issue: Issued for Review
Subject: Electrical Information
Message:
Hi Jacob,

Thank you for sending the Electrical information we needed. Any support files for the electrical work, please send them over by Friday.

Regards,
Joe Fredericks

Response required by 18 December 2020

Transmitted To:

Company	Name
Coit Contracting	Jacob Palmer

[Click here to download all Transmittal files.](#)
Click on Document Nos to download them individually.

Item	Document No	Rev	Sts	Title
1	CC-L21-ELEC-DRW-002	B	IFI	21st Floor Electrical Plan
2	CC-L22-ELEC-DRW-002	B	IFI	22nd Floor Electrical Plan

Transmitted by: Joe Fredericks, Houston Contracting

Generated by InEight Document © 2001-2021 InEight Inc.

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What's next: The transmittal is shown in the Transmittals Sent items register. If the transmittal is large, and processing takes place in the background, a processing icon shows to the left of the item in the register. When processing is complete, a check mark icon shows. If the process was unsuccessful, an exclamation point shows.

NOTE

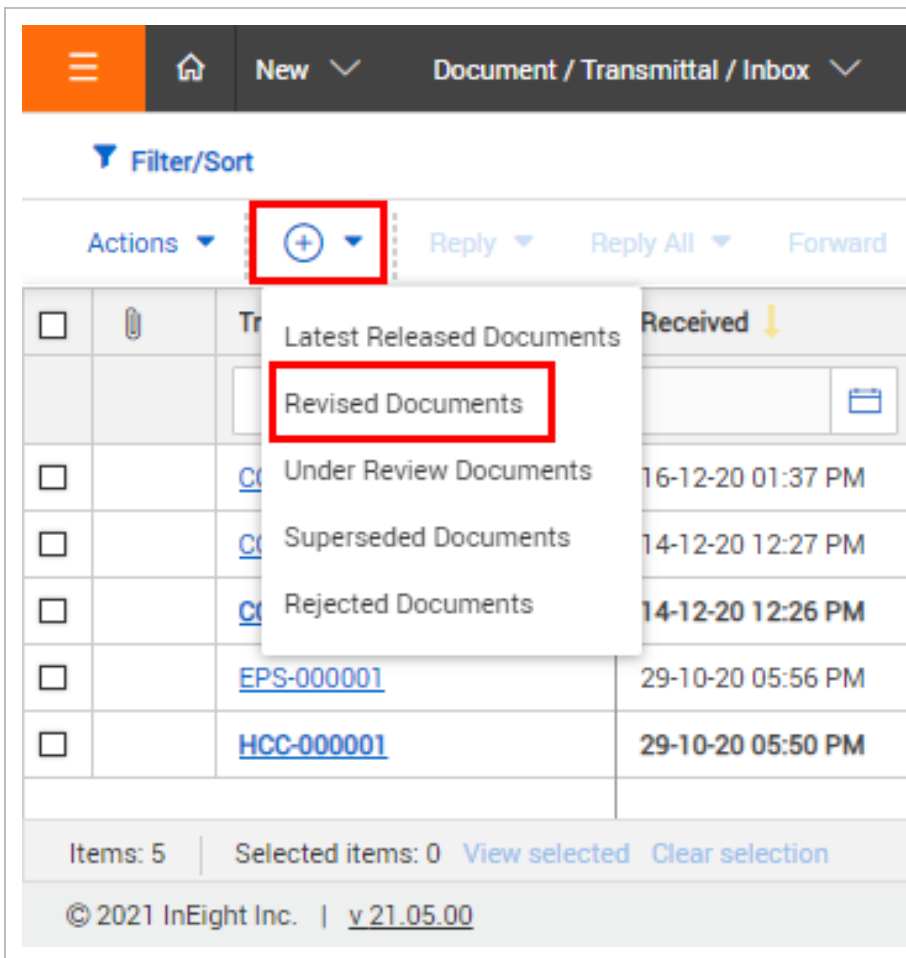
- You are also given the option to transmit documents after you upload them.
- Recipients receive transmittals via their nominated email account. Documents can be downloaded individually from the links on the transmittal. Recipients can also choose to download the documents in bulk.
- When you download a document from a transmittal, a prompt to download a later revision will appear if a later revision has been uploaded.
- 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.
- Recipients can automatically be notified about future transmittals of revised documents by selecting **Notify on revision** at the top of the Details page. .
- To link items to a transmittal, click the **Links** tab.
- To generate a preview of the transmittal before sending, click **Print Preview**.
- It is possible to send confidential transmittals where only the sender and recipient (s) can view the transmittal. This must be enabled by InEight. If enabled, users will be able to select the **Send Transmittal as Confidential** option when composing the transmittal.

1.4 TRANSMITTING REVISED DOCUMENTS

You can transmit revised documents directly from the Transmittals Register.

1.4.1 To transmit revised documents:

1. Click the **Add** icon, and then select **Revised Documents**.



2. Enter the recipient details.
3. Click the **Add** icon to add documents.

4. Enter the search criteria for the documents and click **Search**.

Add documents ✕

Search criteria for Documents Hide search

Show:
Latest unrestrained ▾

Filter by:	Column	Operator	Value
+	Select one... ▾	Select one... ▾	Select some items.. ▾ ✕
+ AND	Select one... ▾	Select one... ▾	Select some items.. ▾ ✕

Clear Search

Search results Show results

Cancel Add

5. Select the documents and click **Add**.

Add documents
✕

Search criteria for Documents Show search

Search results Hide results

<input type="checkbox"/>	DocumentNo	Rev	Sts	Title	Disc	Cat	PDF	DWG	DOC	OTH...	Include comme...
<input checked="" type="checkbox"/>	NSK20200226-0...	A	IFI	NSK20200226-002 T	NSK	C1	<input checked="" type="checkbox"/>				
<input checked="" type="checkbox"/>	NSK20200226-0...	A	IFI	NSK20200226-002 T	NSK	C1	<input checked="" type="checkbox"/>				
<input type="checkbox"/>	1-2182020-PDF-...	A	IFI	1-2182020-PDF-001	TEST	C1	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	NSK20200226-0...	A	IFI	NSK20200226-002 T	NSK	C1				<input type="checkbox"/>	
<input type="checkbox"/>	TS-25062019-U...	B	IFI	TS-25062019-unrestdoc-0...	ARCH	C10	<input type="checkbox"/>			<input type="checkbox"/>	
<input type="checkbox"/>	TS-17062019-U...	B	IFI	TS-17062019-unrestdoc-0...	ARCH	C12				<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	9999999999	A	IFI	9999999999	ADMIN	C1	<input type="checkbox"/>				
<input type="checkbox"/>	DIL-20200123-007	A	IFI	DIL-20200123-007	CIV	C1				<input type="checkbox"/>	
<input type="checkbox"/>	TEST18042013	A	IFI	TEST18042013	ADMIN		<input type="checkbox"/>				
<input type="checkbox"/>	SAMPLEDOC1	A	EPC	Sample Document 1	EPC	ALL		<input type="checkbox"/>			<input type="checkbox"/>
<input type="checkbox"/>	SAMPLEDOC4	A	EPC	Sample Document 4	EPC	C10		<input type="checkbox"/>			<input type="checkbox"/>

Items: 413 | Selected items: 2

Cancel
Add

6. **Notify on revision** , if applicable.

When the option is selected, and there is a business reason that will prevent recipients from receiving access to future revisions, a warning box opens listing the names of the people who

will not receive future revisions of the documents automatically.

The screenshot shows the 'Latest Revised Documents' interface. At the top, there is a header with a logo and the text 'Latest Revised Documents'. Below this, there are tabs for 'DETAILS' and 'LINKS'. A toolbar contains several actions: 'Actions' (dropdown), 'Save as draft', a copy icon, 'Confidential' (button), 'Request read receipt', and 'Notify on revision' (button, highlighted with a red box). To the right of these actions are 'Cancel' and 'Send' (green button with a dropdown arrow). Below the toolbar, there is a 'To' field with the value 'Frank Jacobs (Engineering Project Services) X'. A 'Subject' field contains '*Subject Line Text'. There are three dropdown menus: 'Reason for Issue' (set to 'Issued for Tender'), 'Respond by message' (set to 'Response required by'), and 'Respond by date' (set to '04-12-20'). Below these is a rich text editor with a toolbar showing font settings (Arial, 13 px) and various formatting options (bold, italic, underline, list, link). The text area contains a placeholder note: '*This is a text input that will be used for the Site Instruction Mail Template only.' and the word 'Regards,'. At the bottom left, there is a copyright notice: '© 2021 InEight Inc. | v 21.05.00'. At the bottom right, the 'INEIGHT' logo is visible.

7. Click **Send**.

NOTE

- For more information on creating transmittals, see **Creating and sending transmittals**.
- Use the **Create pending transmittals** option to initiate a transmittal of revised documents.

1.5 RESPONDING TO AND FORWARDING TRANSMITTALS

You can respond to transmittals directly from the Transmittals Register.

1.5.1 To respond to a transmittal:

1. Select the transmittal.
2. Click **Reply** and select the type of mail.

Actions ▾ (+) ▾ Reply ▾ Reply All ▾ Forward Mark as ▾				
<input type="checkbox"/>		Transmittal No	Received ↓	Package
<input type="checkbox"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/>		HCC-000232	09-04-20	12233
<input type="checkbox"/>		TRAINING01-DES0012	08-04-20	
<input type="checkbox"/>		TRAINING01-DES0011	08-04-20	
<input type="checkbox"/>		TRAINING01-DES0010	08-04-20	

3. Enter in the reply details

Site Instruction

DETAILS LINKS

Actions ▾ Save as draft Request read receipt

 ▾

From: Joe Fredericks

* To:

Cc:

* Subject:

Respond by date:

Priority:

Status:

Orig. Ref. No.:

Discipline:

Area:

Location:

Attach a copy of the mail as HTML PDF

Plain Text

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4. Click **Send**.

NOTE

- The transmittals **Inbox** folder stores all notifications received from other users via the Packages module.
- Replies are automatically linked to the original transmittal.
- Based on user access, a transmittal will be marked as read if at least one recipient within the company or department has opened the transmittal if the user is in department or company view.
- Based on user access, if there are multiple recipients from a company or department on the transmittal, only one instance of the transmittal will show in the **Inbox** folder. There is an option at the bottom of the Register that allows you to hide duplicate transmittals.
- To indicate that a recipient has responded to a transmittal, update the **Response date** via the **Sent Items** folder either at a transmittal or recipient level.

1.5.2 To forward transmittals:

1. Select the transmittal.
2. Click **Forward**.

Actions ▾ (+) ▾ Reply ▾ Reply All ▾ Forward 📎 ▾				
<input type="checkbox"/>		Transmittal No	Sent ↓	Package
<input type="checkbox"/>		<input type="text"/>	<input type="text"/> 📅	<input type="text"/>
<input checked="" type="checkbox"/>		TRAINING01-DES0030	09-04-20	
<input type="checkbox"/>		HCC-000232	09-04-20	12233
<input type="checkbox"/>		TRAINING01-DES0029	08-04-20	
<input type="checkbox"/>		TRAINING01-DES0028	08-04-20	
<input type="checkbox"/>		TRAINING01-DES0027	08-04-20	

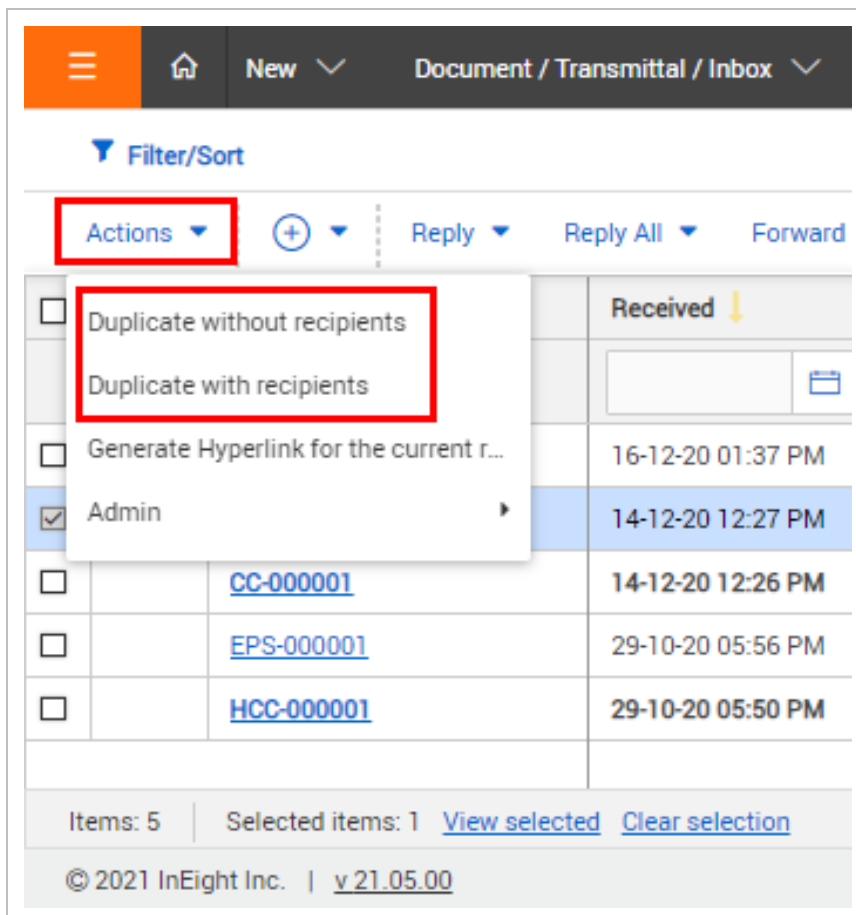
3. In the **To** field, enter in the recipient(s).
4. Click **Send**.

1.6 DUPLICATING TRANSMITTALS

You can duplicate a transmittal with its existing attributes and edit the new transmittal, including recipients as required.

1.6.1 To duplicate a transmittal:

1. Click **Actions** and select either:
 - a. **Duplicate with recipients.**
 - b. **Duplicate without recipients.**



The screenshot shows the user interface for managing transmittals. At the top, there is a navigation bar with a home icon, a 'New' dropdown, and a 'Document / Transmittal / Inbox' dropdown. Below this is a 'Filter/Sort' section. The main area displays a list of transmittals with columns for checkboxes, document IDs (e.g., CC-000001, EPS-000001, HCC-000001), and dates. The 'Actions' dropdown menu is open, showing options: 'Duplicate without recipients', 'Duplicate with recipients', 'Generate Hyperlink for the current r...', and 'Admin'. The 'Duplicate without recipients' and 'Duplicate with recipients' options are highlighted with a red box. The 'Admin' option is also highlighted with a blue box. At the bottom of the interface, there is a status bar showing 'Items: 5', 'Selected items: 1', and links for 'View selected' and 'Clear selection'. The footer indicates '© 2021 InEight Inc. | v 21.05.00'.

2. Edit the transmittal details.
3. Click **Send**.

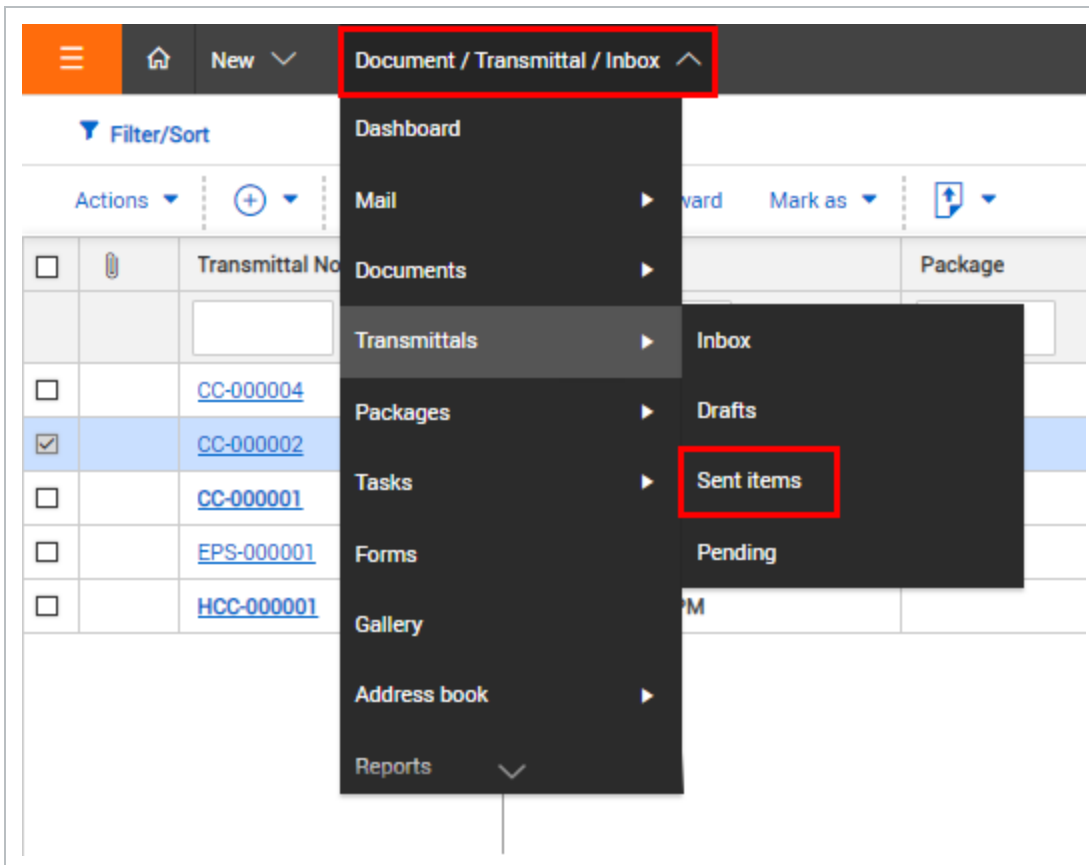
NOTE If the documents on the duplicated transmittal have been superseded, you will be prompted to choose between sending the latest or superseded revisions.

1.7 RESENDING TRANSMITTALS

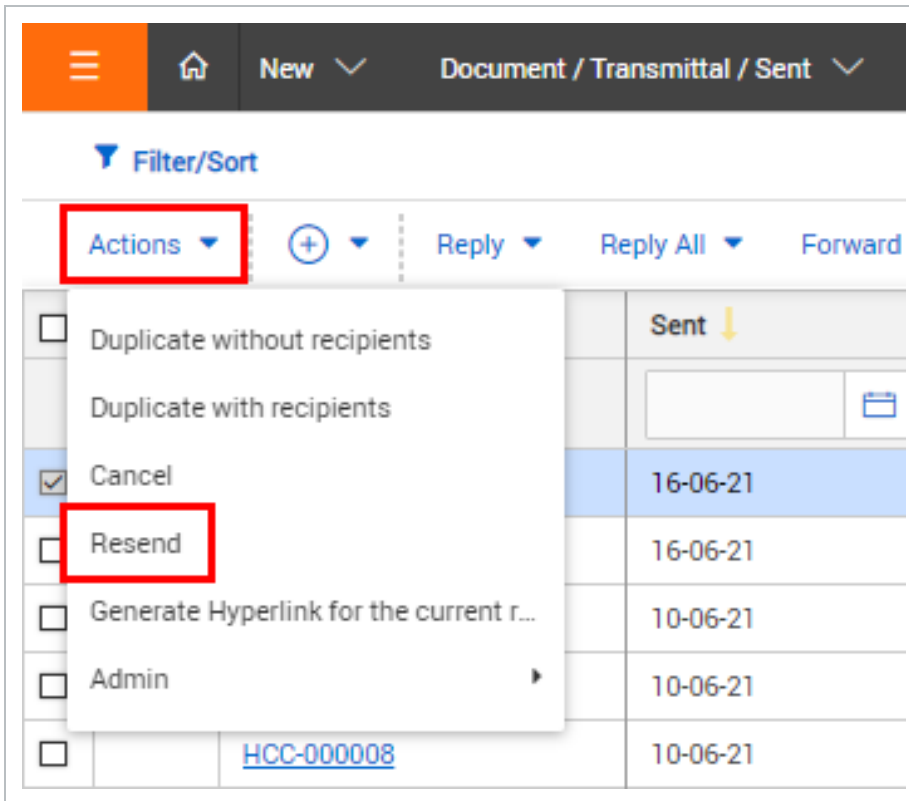
Resending transmittals resends the original transmittal to the same recipients.

1.7.1 To resend a transmittal:

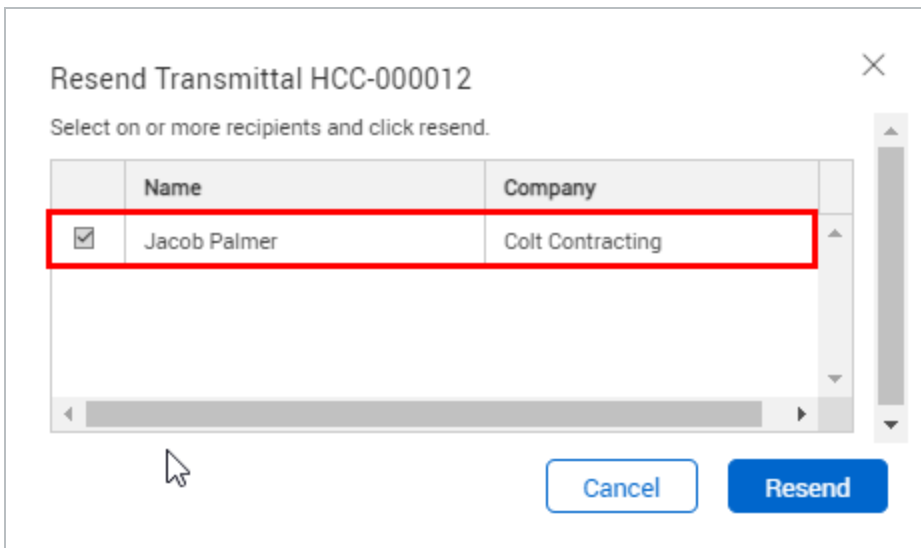
1. Click the **Module** drop-down menu.
2. In the **Transmittals** menu, select **Sent Items**.



- 3. Click **Actions** and select **Resend**.



- 4. Click **Yes**.
- 5. Select the recipients.



- 6. Click **Resend**.

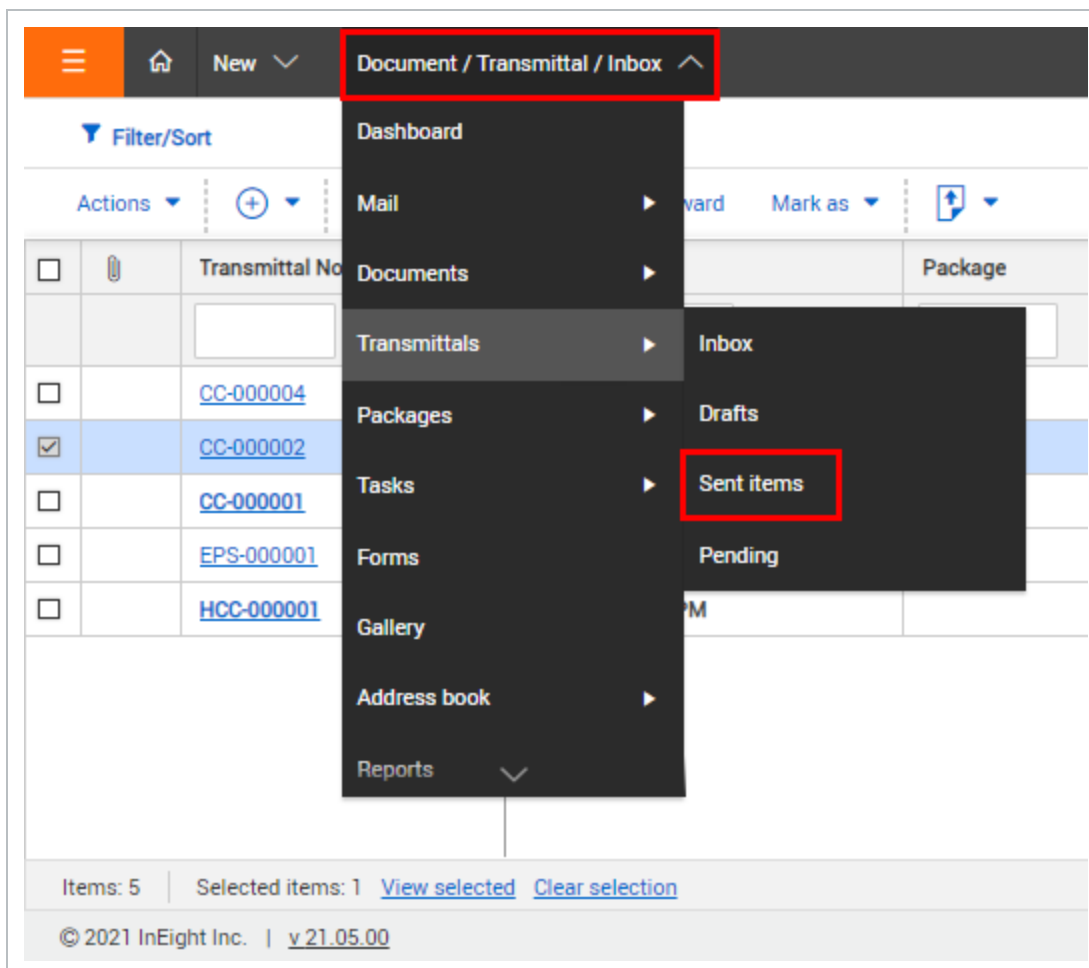
NOTE Transmittals can only be resent by the user who created them or by other users in the same company or department.

1.8 CANCELLING TRANSMITTALS

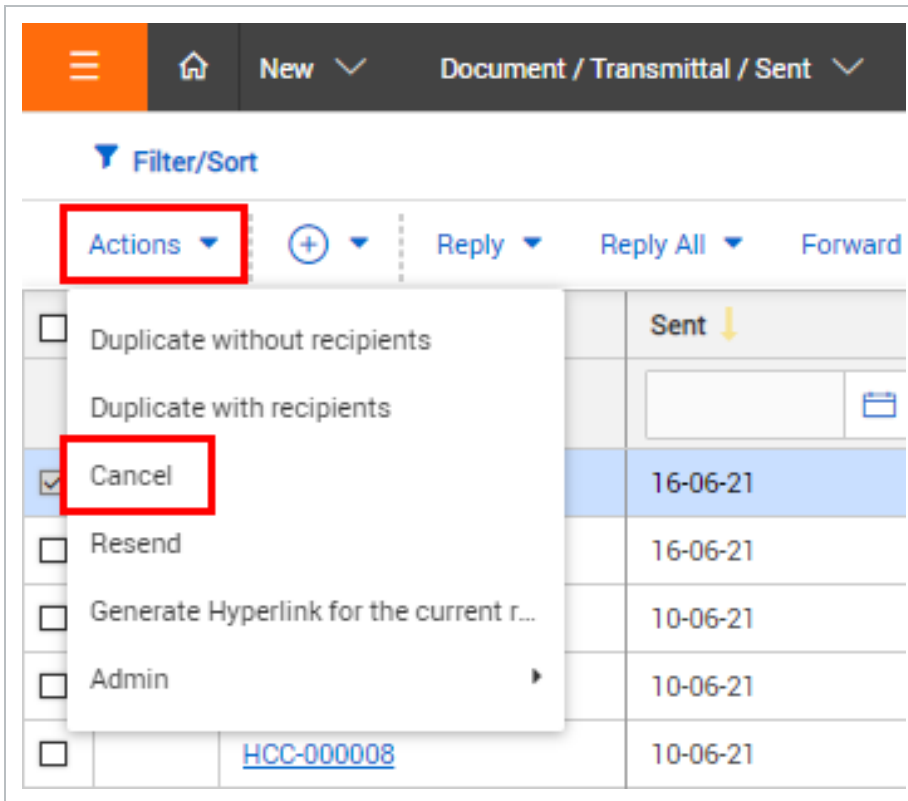
You can cancel a transmittal from the Sent Items folder in the Transmittals Register.

1.8.1 To cancel a transmittal:

1. Click the **Module** drop-down menu.
2. In the **Transmittals** menu, click **Sent Items**.

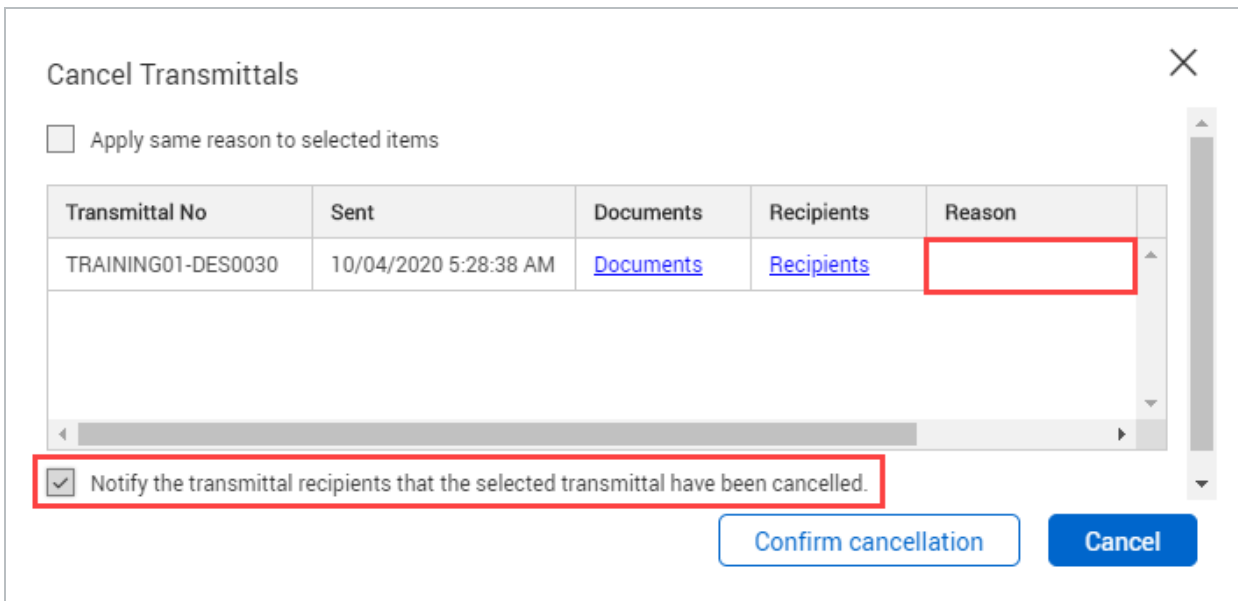


3. Click **Actions** and select **Cancel**.



4. Click **Yes**.

5. Enter a reason for cancelling the transmittal.



6. Select whether you want to notify the recipient(s).

7. Click **Confirm cancellation**.

NOTE

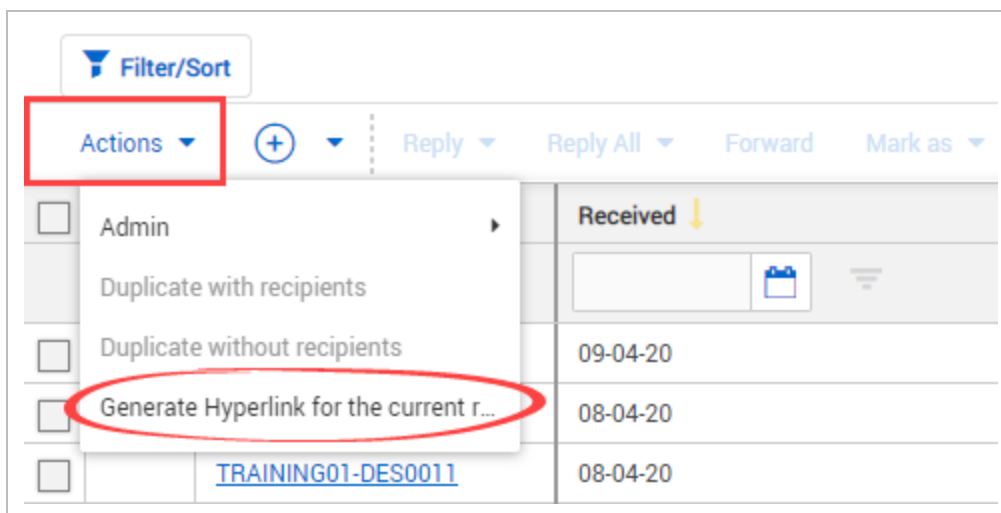
- The cancelled by, cancelled on and cancelled reason is shown in the detailed view of the cancelled transmittal.
- Transmittals can only be cancelled by the user who created them or by other users in the same company or department depending on granted permissions.

1.9 GENERATING A REGISTER HYPERLINK

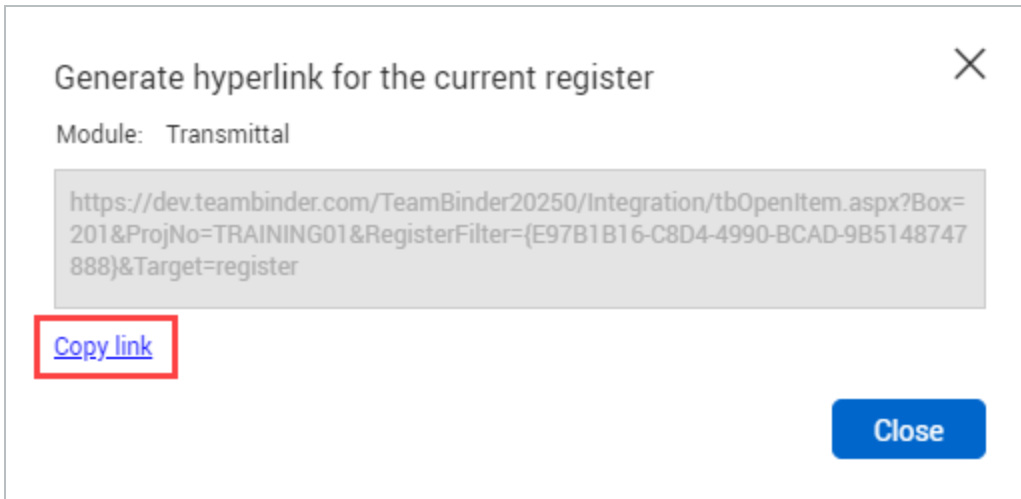
A hyperlink can be generated to show the current Transmittal Register view.

1.9.1 To generate a Register hyperlink:

1. Click **Actions** and select **Generate Hyperlink for the current Register**.



2. Click **Copy link**.






3. Click **Close**.

1.10 EXPORTING TRANSMITTALS TO HTML OR PDF

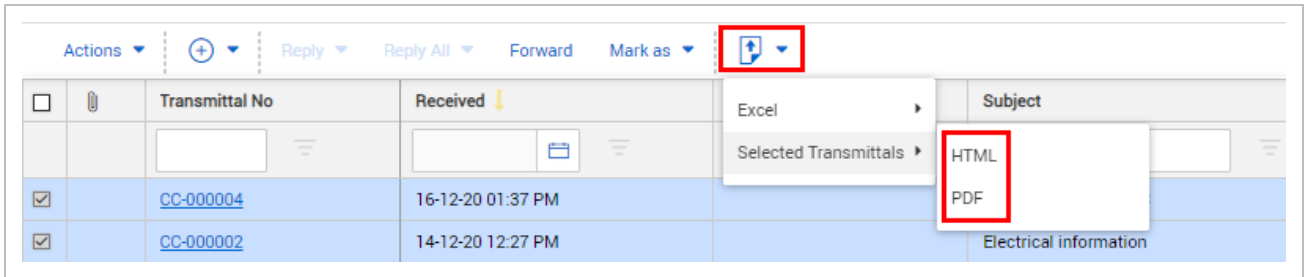
Transmittals stored in the **Inbox**, **Sent Items** or **Drafts** folders can be exported to HTML or PDF format in a single zip file.

1.10.1 To export transmittals:

1. Select the transmittal(s) in the **Document Register**.
2. Click the **export icon**.

Actions ▾  ▾ Reply ▾ Reply All ▾ Forward Mark as ▾  ▾				
<input type="checkbox"/>		Transmittal No	Received ↓	Package
<input type="checkbox"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/>		HCC-000232	09-04-20	12233
<input checked="" type="checkbox"/>		TRAINING01-DES0012	08-04-20	
<input type="checkbox"/>		TRAINING01-DES0011	08-04-20	

3. In the **Selected Transmittals** menu, select **HTML** or **PDF**.



4. Click **Download**.

Name	Type	Compressed size	Password ...	Size	Ratio	Da
TRAINING01-IssueOfStandardPack...	Adobe Acrobat Document	31 KB	No	36 KB	15%	22,
TRAINING01-IssueOfStandardPack...	Adobe Acrobat Document	31 KB	No	36 KB	15%	22,

CHAPTER 2 – MANAGING TRANSMITTALS

You can manage transmittals by performing a number of tasks on them.

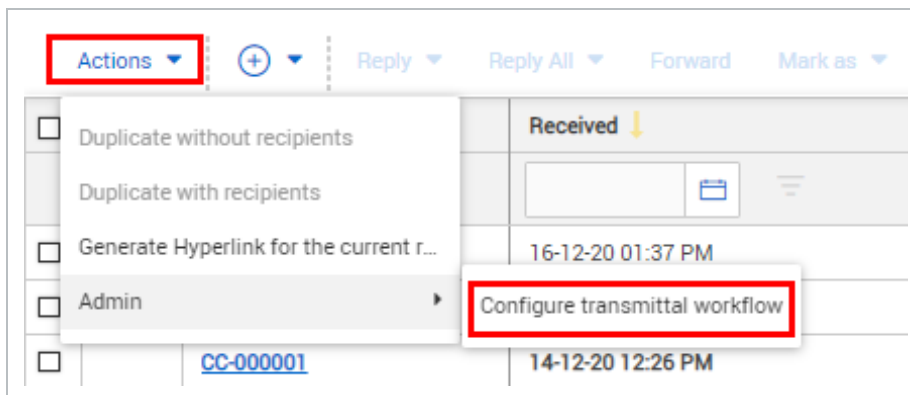
For more information on these tasks, see the links below.

2.1 CONFIGURING A TRANSMITTAL WORKFLOW

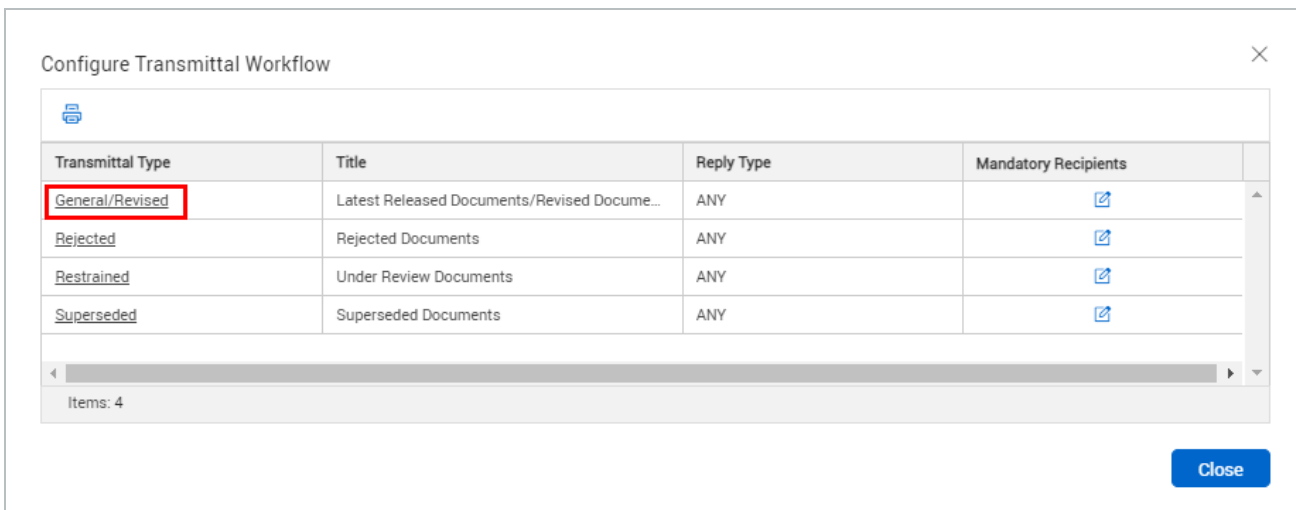
You can configure a transmittal workflow from the Admin menu.

2.1.1 To configure transmittal workflow:

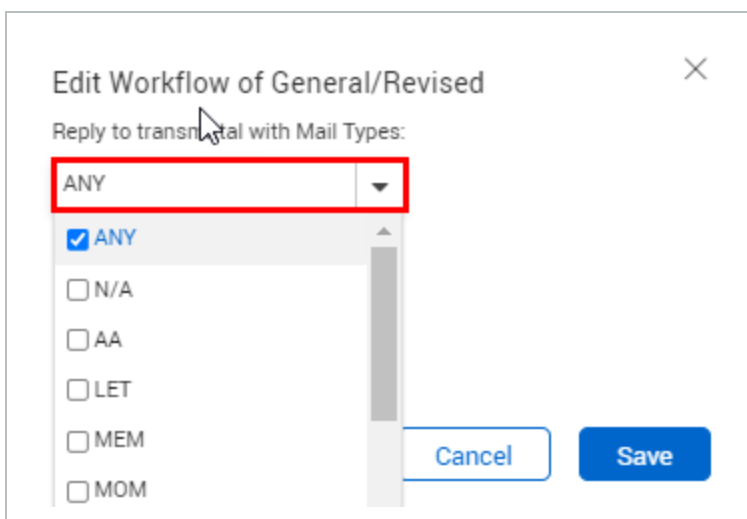
1. Click **Actions**.
2. In the **Admin** menu, select **Configure transmittal workflow**.



3. Click the transmittal type you want to edit.



4. Select the mail types that the transmittal can be replied with.



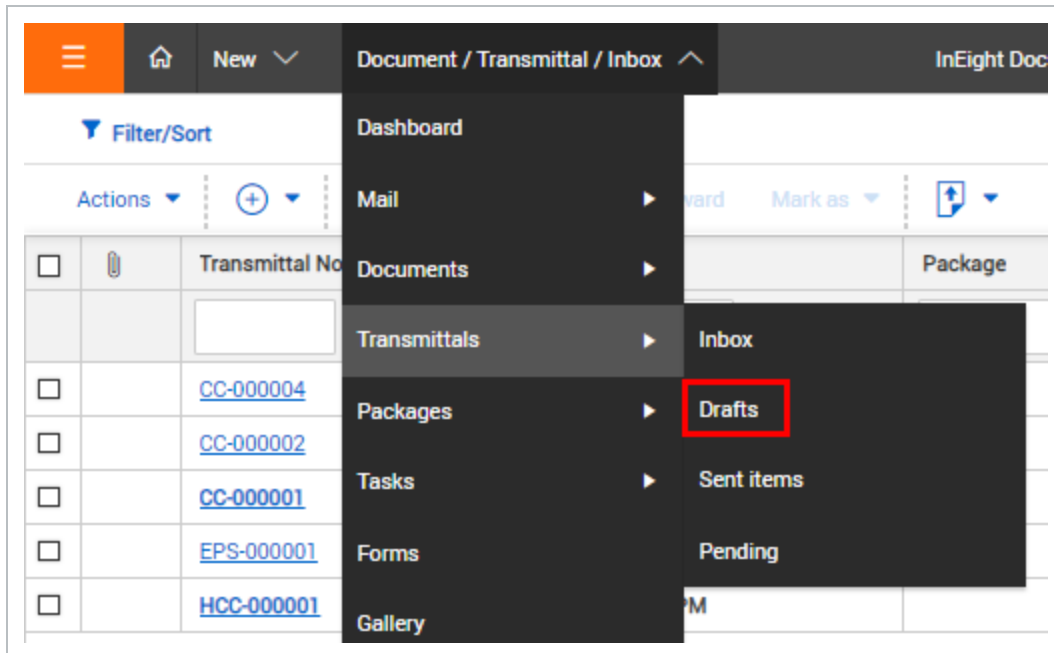
5. Click **Save**.

2.2 SENDING TRANSMITTAL DRAFTS

Transmittals that have been created and saved are stored in the **Drafts** folder until they are sent or deleted.

2.2.1 To send transmittal drafts:

1. Click the **Module** drop-down menu.
2. In the **Transmittals** menu, click **Drafts**.



3. Select the transmittal.
4. Edit the transmittal details.
5. Click **Send**.

NOTE

- Printed drafts will display DRAFT at the top of the page and do not have a transmittal number. The transmittal number is assigned after the transmittal is sent.
- If a document in a drafted transmittal is revised prior to the transmittal being sent, the superseded document will automatically be removed from the transmittal. The user will be notified when opening the drafted transmittal.

2.3 ACKNOWLEDGING TRANSMITTALS

InEight Document tracks and maintains a history of:

- Every transmittal sent.
- Every document downloaded by recipients from transmittals.

- A history of transmittal acknowledgements and responses.

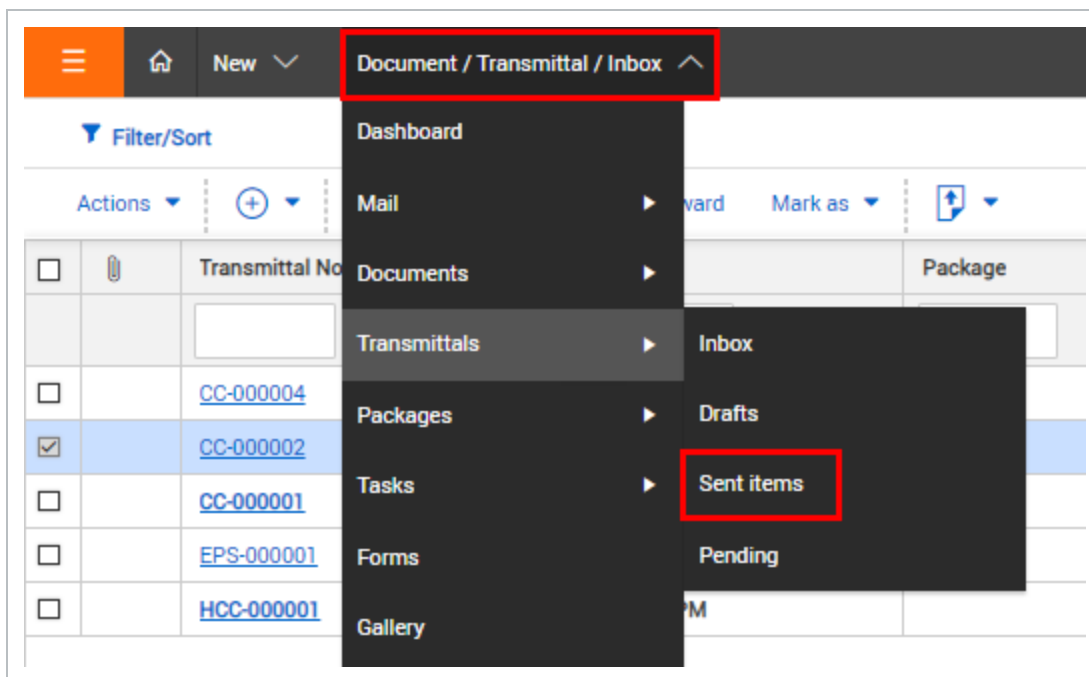
A transmittal acknowledgement is a signed copy of a transmittal that is returned to the sender by the recipient of the transmittal. This is a receipt of the transmittal and the documents or drawings it contains.

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 as acknowledged automatically.

Transmittal acknowledgements can be updated manually via the **Sent Items** folder.

2.3.1 To update transmittal acknowledgements manually:

1. Click the **Module** drop-down menu.
2. In the **Transmittals** menu, select **Sent Items**.



3. Select the date in the **Acknowledgement Received** field.

4. Select the received date in the **Responses Received** field.

Electrical Information
From: Joe Fredericks, Houston Contracting Transmittal No: HCC-000012

MESSAGE DOCUMENTS RECIPIENTS ATTACHMENTS LINKS

Reply Reply all Resend Cancel

Acknowledgement Received: dd-mm-yy Responses Received: dd-mm-yy Cancel Save changes

Document Transmittal

Project Number: TRAINING504 **Transmittal No:** HCC-000012
Project Title: InEight Document Training Project Master
Date: 16 June 2021, 03:25:56 PM +10:00
Reason for Issue: Issued for Review
Subject: Electrical Information
Message:
Hi Jacob,

Thank you for sending the Electrical information we needed. Any support files for the electrical work, please send them over by Friday.

Regards,
Joe Fredericks

Response required by 18 December 2020

Transmitted To:

Company	Name
Colt Contracting	Jacob Palmer

[Click here to download all Transmittal files.](#)
Click on Document Nos to download them individually.

Item	Document No	Rev	Sts	Title
1	CC-L21-ELEC-DRW-002	B	IFI	21st Floor Electrical Plan
2	CC-L22-ELEC-DRW-002	B	IFI	22nd Floor Electrical Plan

Transmitted by: Joe Fredericks, Houston Contracting

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5. Click **Save changes**.

NOTE

- Users with company or department access levels can update the **Acknowledgement Received** and **Response Received** fields, cancel a transmittal and 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, they usually cannot download the documents on the transmittal (unless they already have access to these documents).

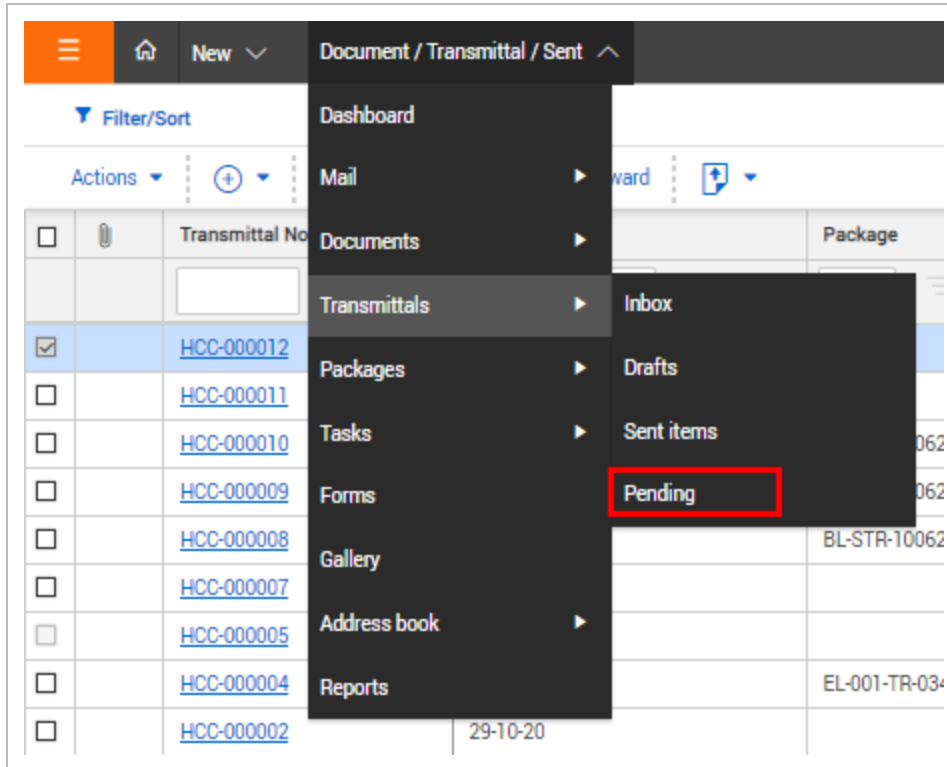
2.4 CHECKING PENDING TRANSMITTALS

When you transmit documents, you can choose to automatically notify recipients of future revisions when they are processed in InEight Document.

If this option is not selected, recipients will not automatically be notified about revisions. The **Pending** folder shows recipients that have not yet received transmittals containing the latest revision of a document.

2.4.1 To check pending transmittals:

1. Click the **Module** drop-down menu.
2. In the **Transmittals** menu, click **Pending**.



3. Use the **Show** drop-down menu to select whether to sort transmittals **By Recipient** or **By Document**.

NOTE

- Pending transmittals are created even if the **Notify on revision** is selected.
- To remove a document from the pending list, select **Ignore** and click **Save changes**.

2.5 SENDING TRANSMITTALS FOR REVIEW

On some projects, transmittals must be reviewed by one or more people prior to being sent. This is managed using the **Send for review** option.

Transmittals sent for review can be:

- Reviewed and returned to the originator for sending
- Reviewed and sent on to the final recipient(s)

- Kept as a draft and sent to another user for review
- Reviewed by an individual or role

2.5.1 To send a transmittal for review:

1. [Create the transmittal.](#)
2. Click the **arrow** next to Send and select **Send for review.**

The screenshot shows the 'Latest Released Documents' interface. At the top, there are tabs for 'DETAILS' and 'LINKS'. Below the tabs, there are several buttons: 'Actions', 'Save as draft', 'Confidential', 'Request read receipt', and 'Notify on revision'. On the right side, there are 'Cancel' and 'Send' buttons. A red box highlights the 'Send' button, and a dropdown menu is open, showing 'Send for review' as the selected option. Below the buttons, there are fields for '*To', 'Cc', and 'Subject'. There are also dropdown menus for 'Reason for Issue', 'Respond by message', and 'Respond by date'. A rich text editor is visible below these fields, with a toolbar containing various formatting options. At the bottom, there is a table with columns for 'Document No.', 'Rev', 'Sts', 'Title', 'Disc', 'Cat', 'PDF', 'MSO', 'DWG', 'Other', and 'Include comment'. The table contains one row with the following data: Document No. A-BPO-101, Rev 00, Sts IFC, Title Floor Plan - 1, Disc ELE, Cat, PDF checked, MSO, DWG, Other, and Include comment. The status bar at the bottom indicates 'Items: 1' and 'Selected items: 0'.

The send for review dialog box opens.

3. Select one of the following radio buttons:
 - **Users**, if you want specific users to review the transmittal
 - **Roles**, if you want people in a specific role to review the transmittal
4. Select the reviewer or role.

Send for review

*Reviewer: Users Roles

|

*Due by:

dd-mm-yy

Cancel Send

5. Select the due by date.
6. Click **Send**.

NOTE Reviewers are notified when they have a pending transmittal.

2.6 PROCESSING UNREGISTERED TRANSMITTALS

You can process unregistered transmittals as controlled documents.

2.6 Step by Step 1 — Process unregistered transmittals as controlled documents

Summary: Process unregistered transmittals, so you can process the documents in the transmittal as mail items

Considerations: Only latest unrestrained transmittal types can be processed. The transmittal remains in the Unregistered mail inbox; it also does not show in your transmittal inbox.

Quick steps:

1. From the Unregistered mailbox, select the transmittal.
2. Expand the Actions menu, and then select Process transmittal as Controlled documents. A new document upload window opens shows the documents from the transmittal.

What's next: Transmittals can then be processed as mail items with the Mail type *Transmittal*.