TRANSMITTALS USER GUIDE

DOCUMENT MANAGEMENT

INEIGHT

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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.

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

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:
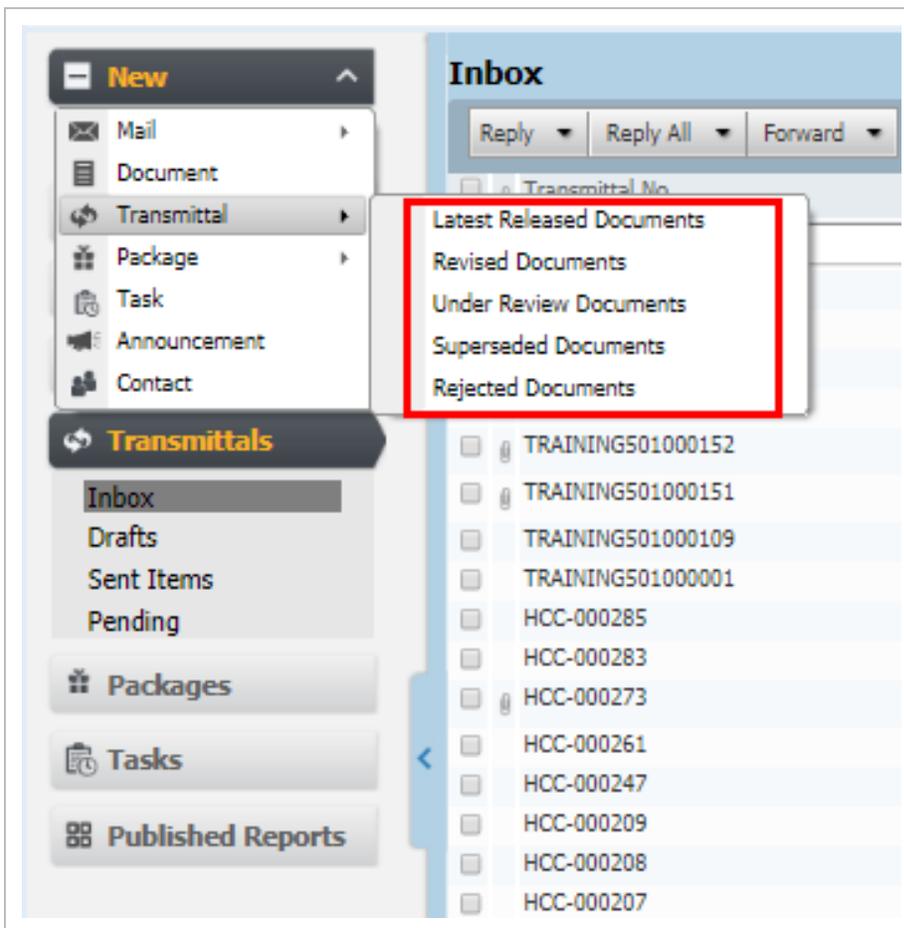
- **Latest Released Documents:** (Default) Used to transmit the latest released revision of one or more un-restrained documents the user has access to.

- **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- **Superseded Documents:** Used to distribute older revisions of documents where the latest revision of the document may not be released, or the older revision must be sent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**.
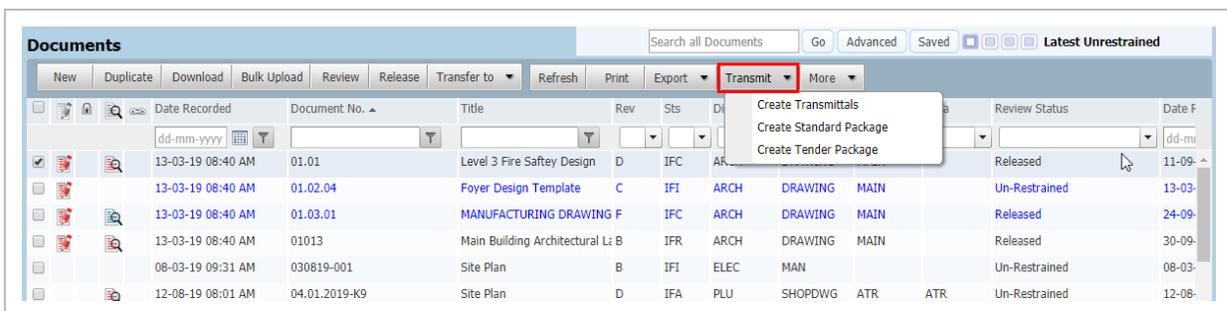
3. Click **To** and select the recipients from the Contacts list. Alternatively use the **Auto-complete** feature to quickly populate the recipients in the **To** box by typing the first few letters of each person's name.
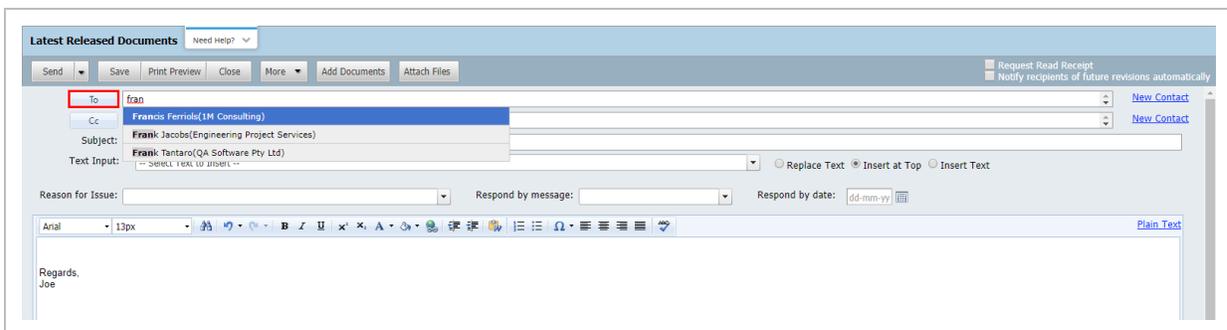
4. Click **Cc** and select any recipients to receive a Cc copy. Recipients receiving a transmittal as a Cc value are treated in the same way as those receiving the transmittal as a To value.
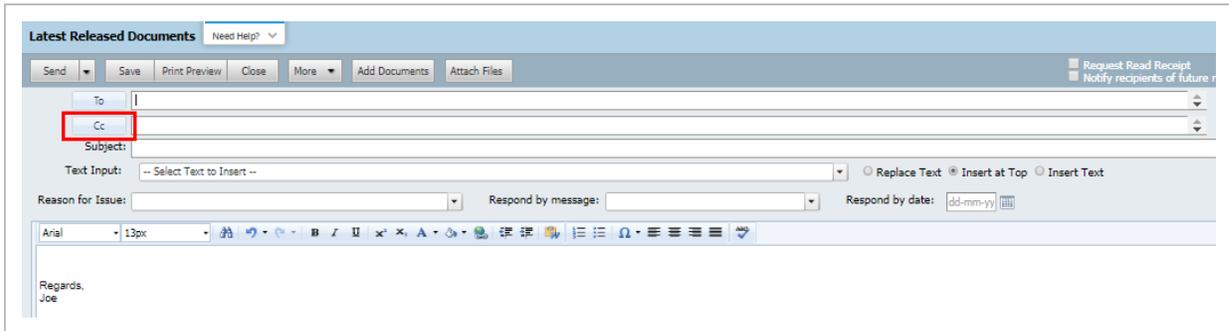
5. If available, select the appropriate options from **Text Inputs.** These will contain predefined strings of text for the subject line and / or the details windows.
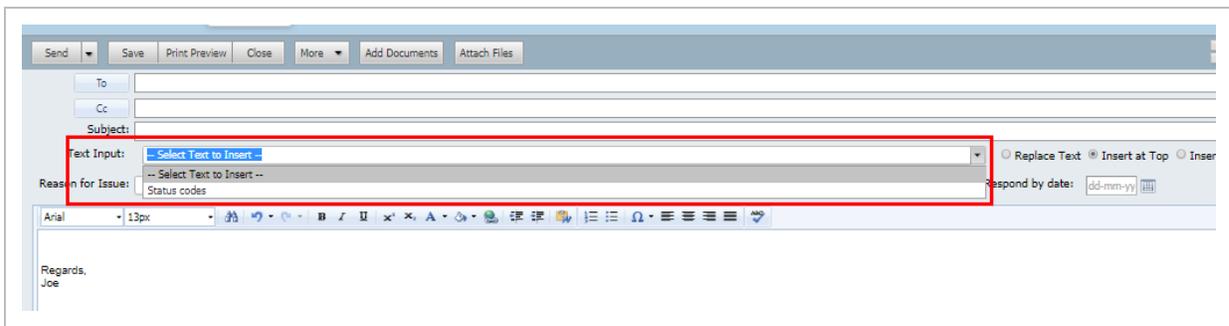
6. Click **Add Documents** and search in the Advanced Document Search window as required. If generating a Transmittal of Review, Rejected or Superseded documents, the system will also further filter for documents in the respective Register View.

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.
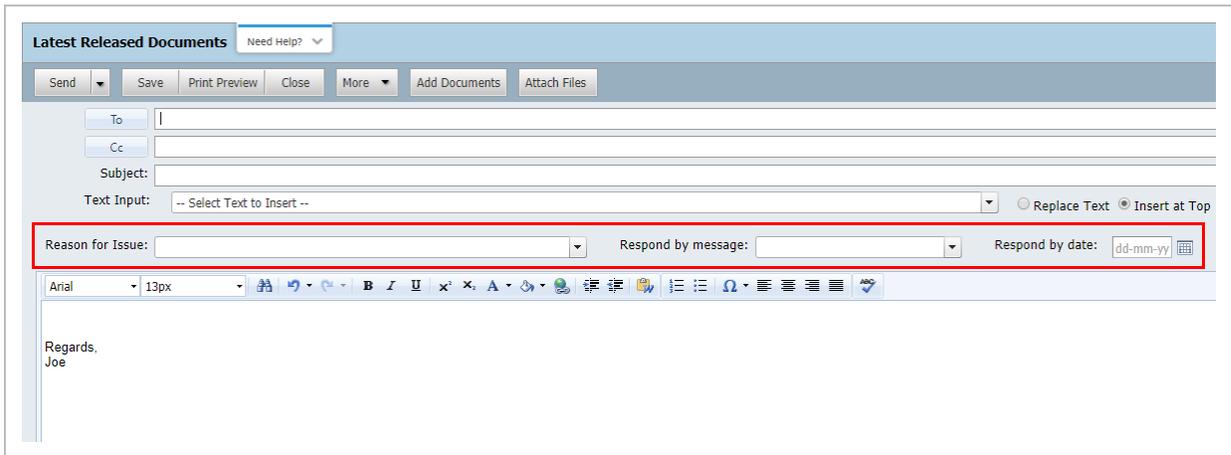
9. Tick the **Request Read Receipt** option if required. This facilitates auto update of the transmittal acknowledgement date.
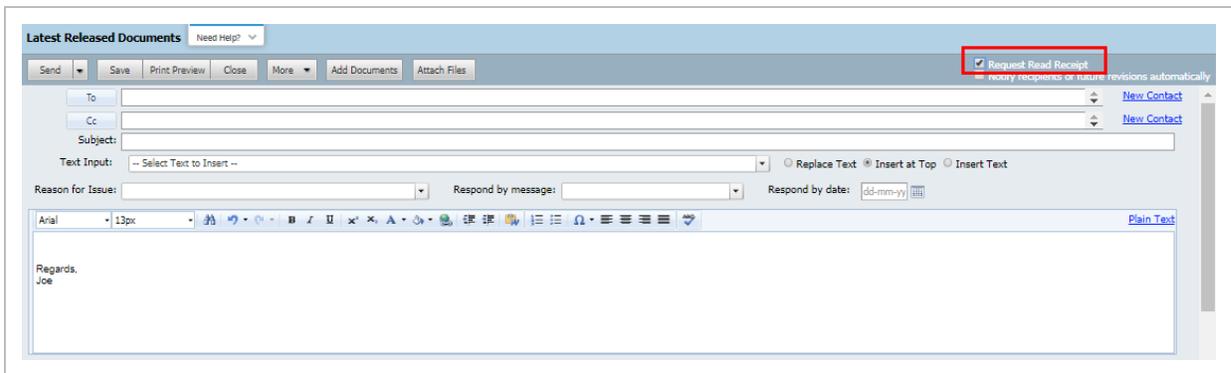
10. The View File formats selected will be the formats that the recipients have access to download. It is possible to include public Text or File Attachment comments relating to the documents

selected **Include Comments**.
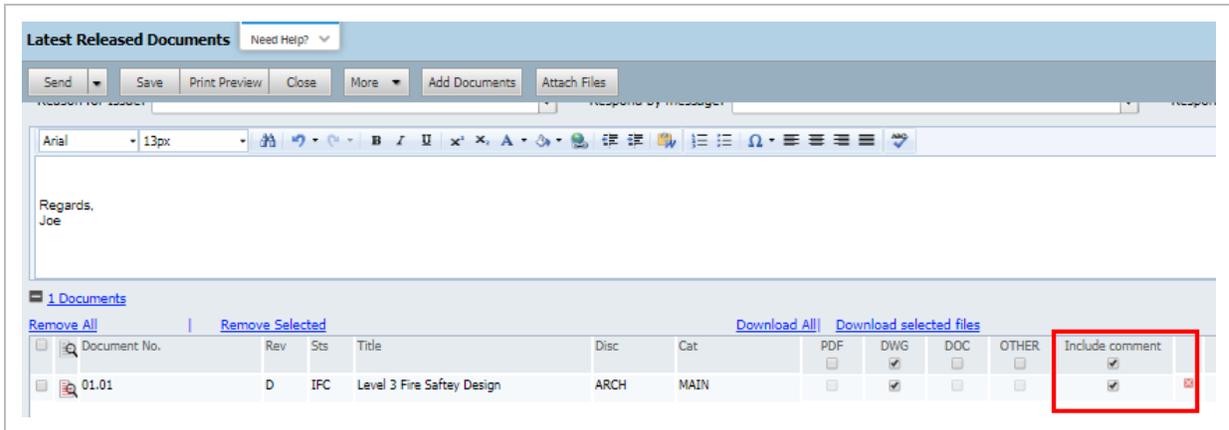
11. Click **Send** and **OK** when prompted.

12. A generated transmittal is displayed and can be printed if required.
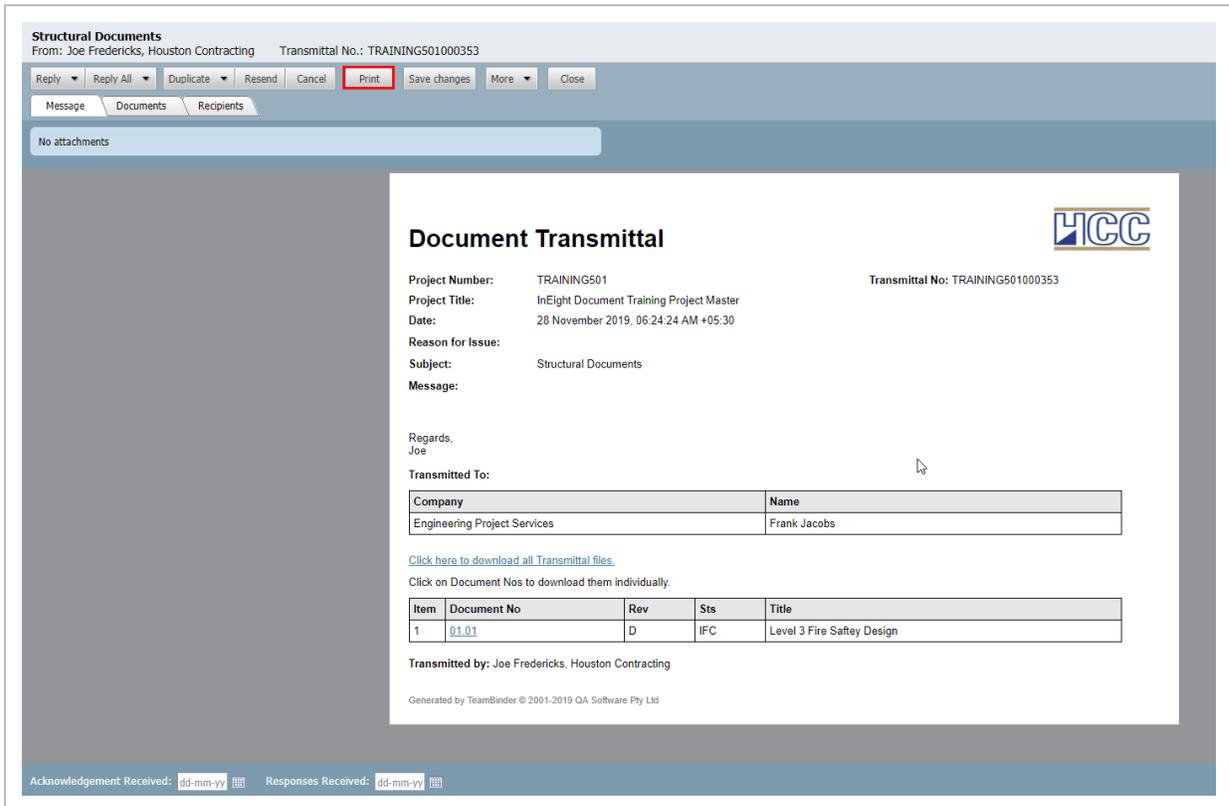
13. Click **Close** and **No** if prompted to save changes.

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**.
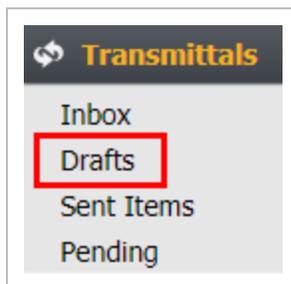
2. To open a transmittal for further editing, double click on it and edit as normal.

3. When finished either click **Save** (the transmittal will remain in the Drafts) or use the **Send** button

from within the transmittal.
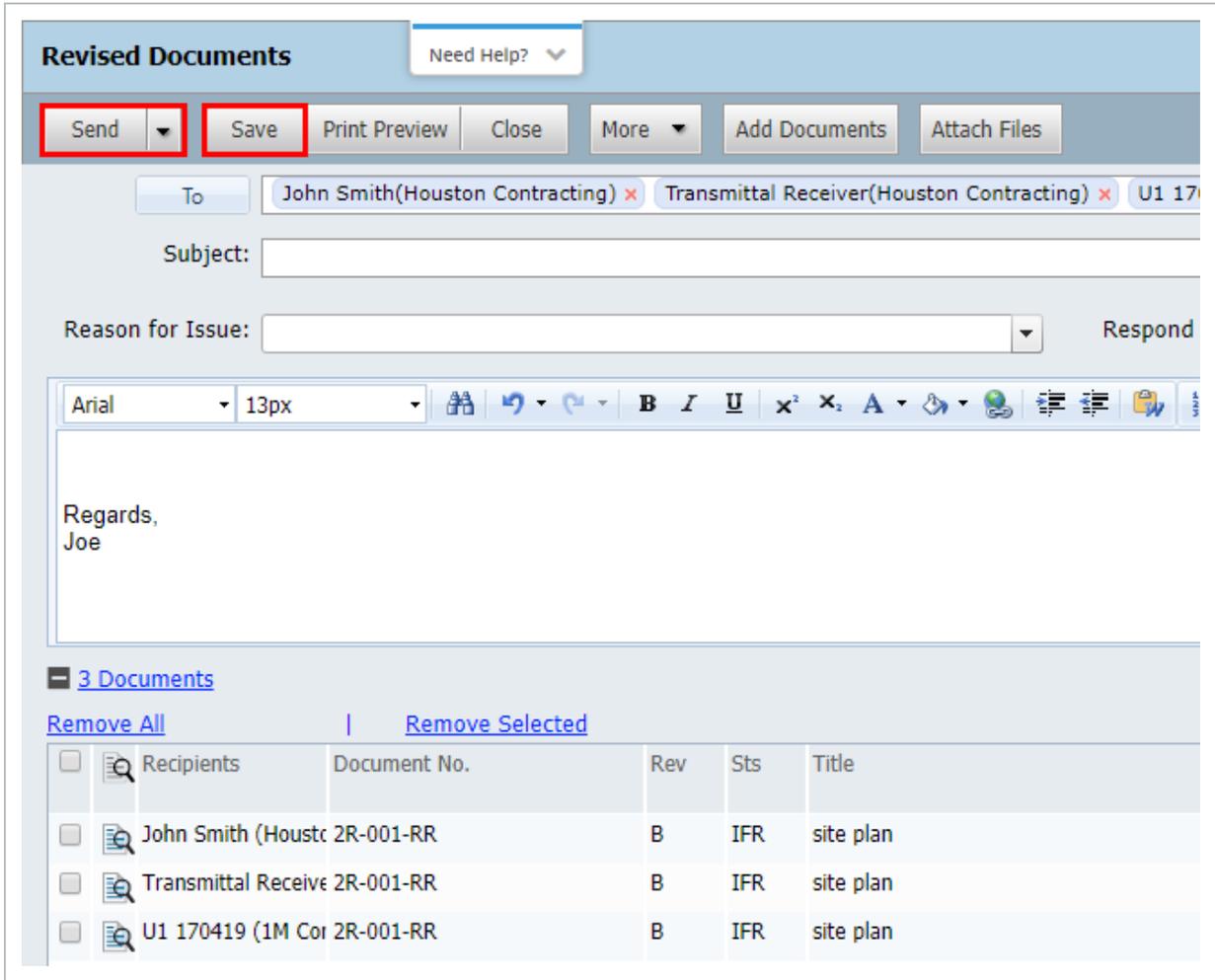
NOTE	• Printed drafts will display DRAFT at the top of the page and do not have a transmittal number. The transmittal number is assigned only once the transmittal is sent.
	• The ability to save a transmittal is limited to only general transmittals and transmittals of superseded documents.
	• If a document 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**.
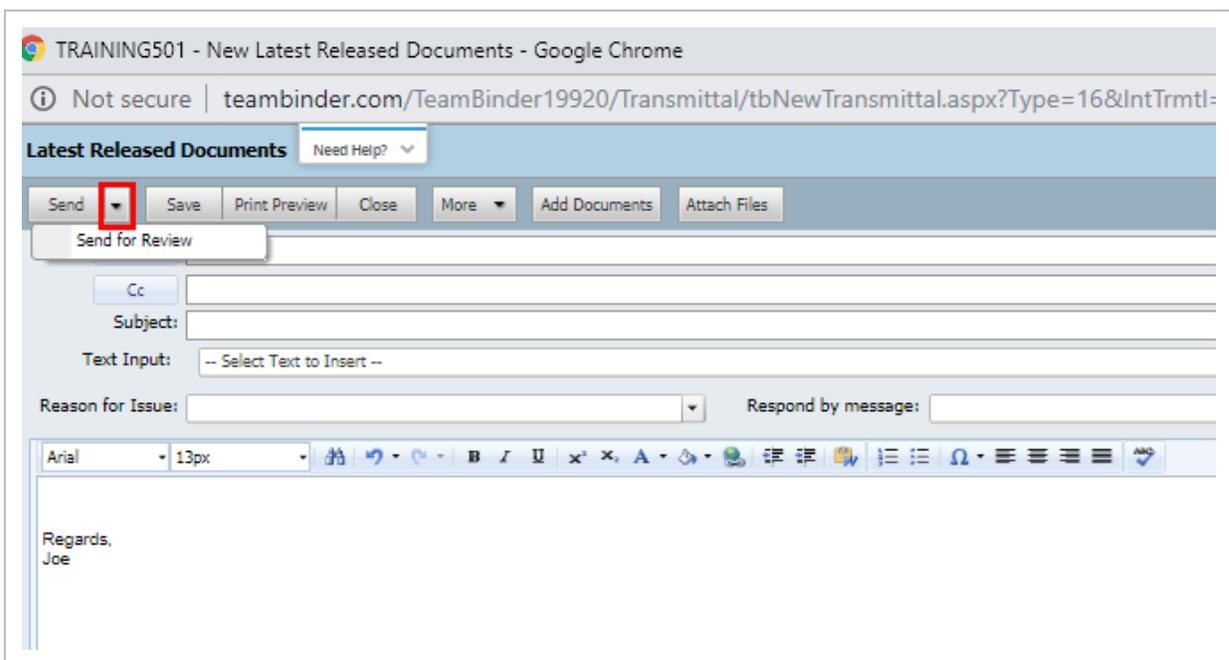
2. At the Send for Review window, select the required reviewer, enter a **due b**y date and any comments and click **OK**.
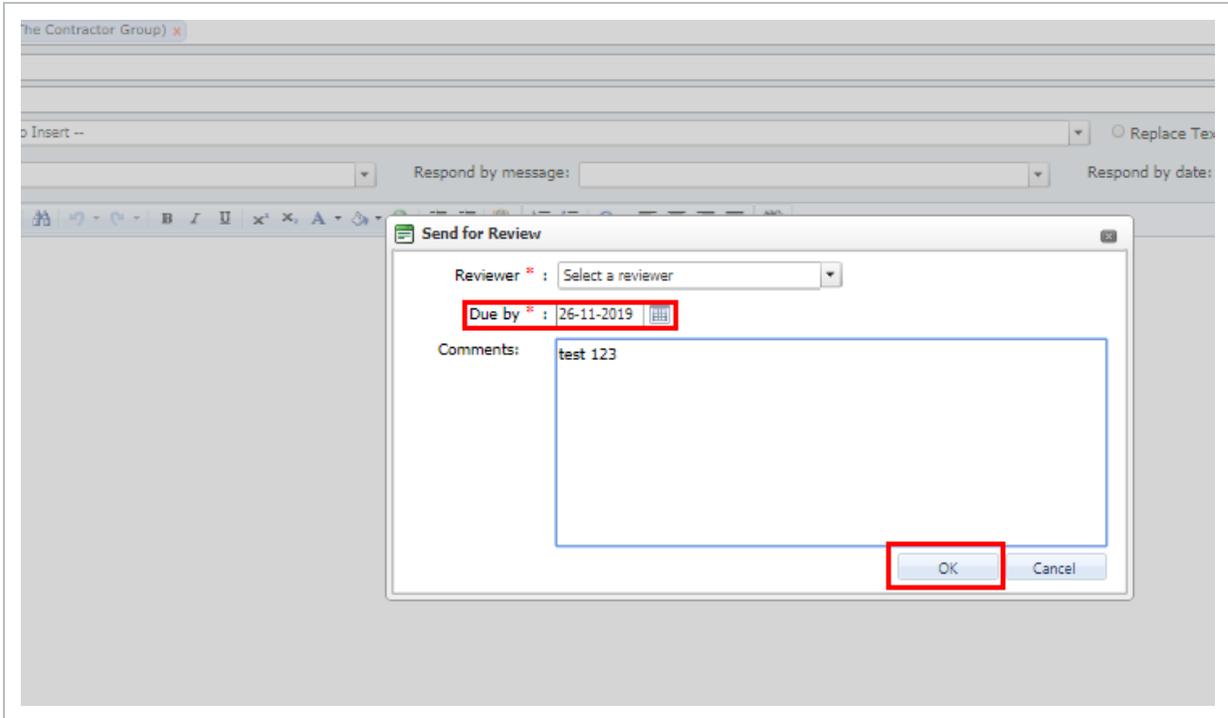
3. An email notification is automatically sent to the reviewer and the transmittal is listed in the Drafts folder of the reviewer and originator until sent. The originator cannot send the transmittal while under review, however, they can open the draft and select **Cancel Review** at any time if required.

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.
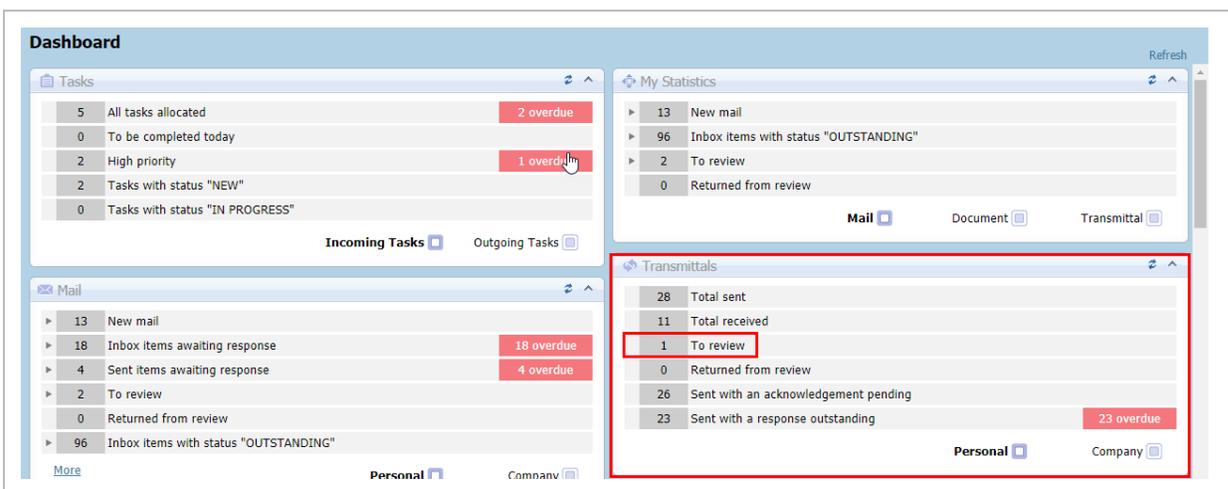
5. When the transmittal under review is opened a "Transmittal for Review" window opens first. Click **OK** once the request details have been read.
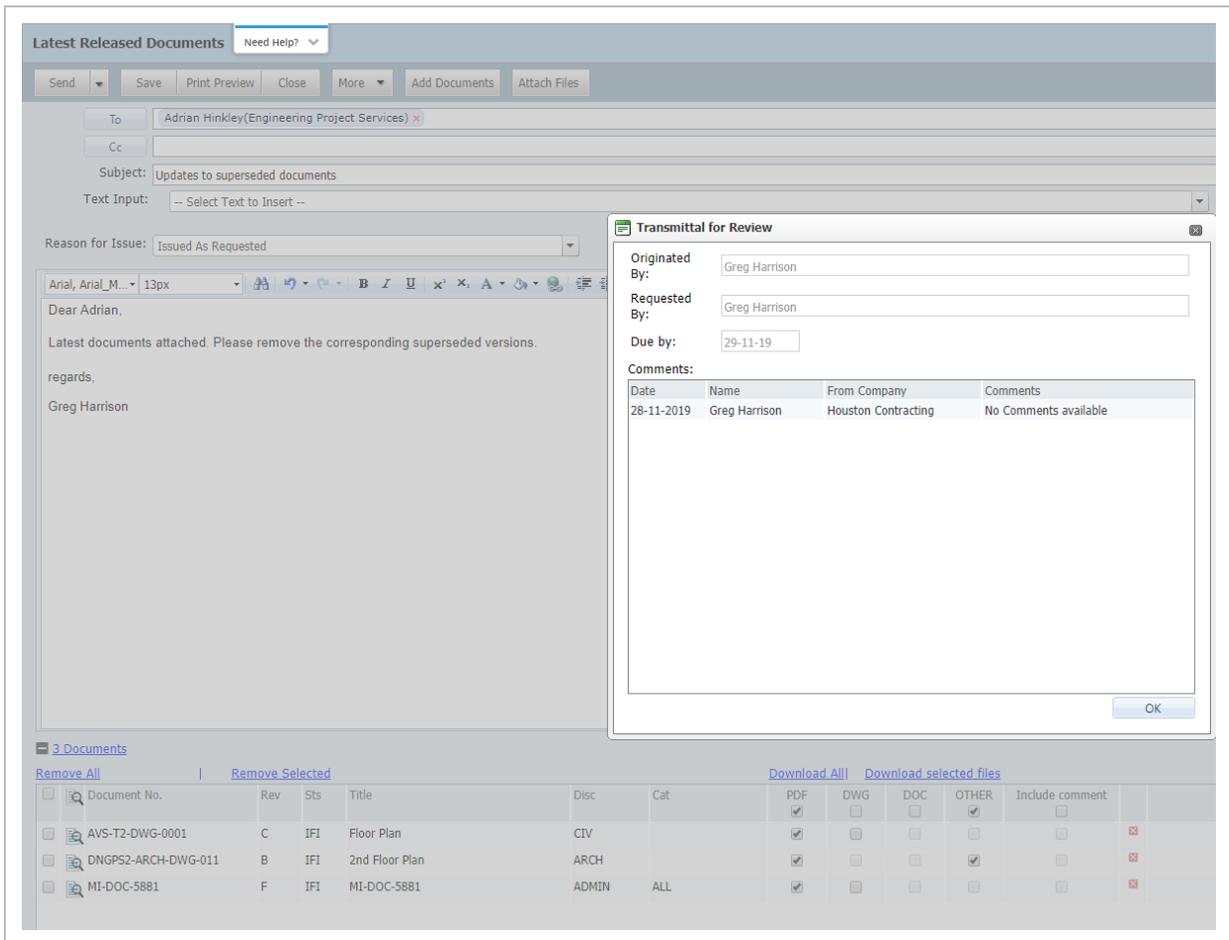
6. The reviewer can make revisions and keep the transmittal in review (return it to the originator or send to another reviewer) using the arrow next to the **Send** button and selecting **Send for Review**.

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

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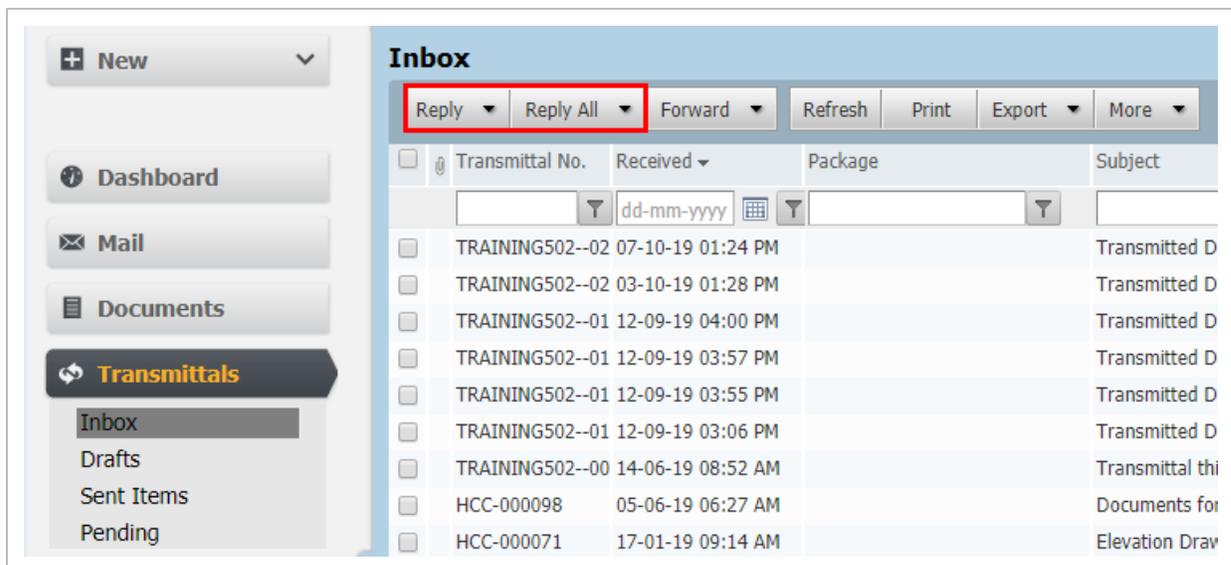
3. Proceed as normal for creating outgoing mail, then click **Send**.

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

1. 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.
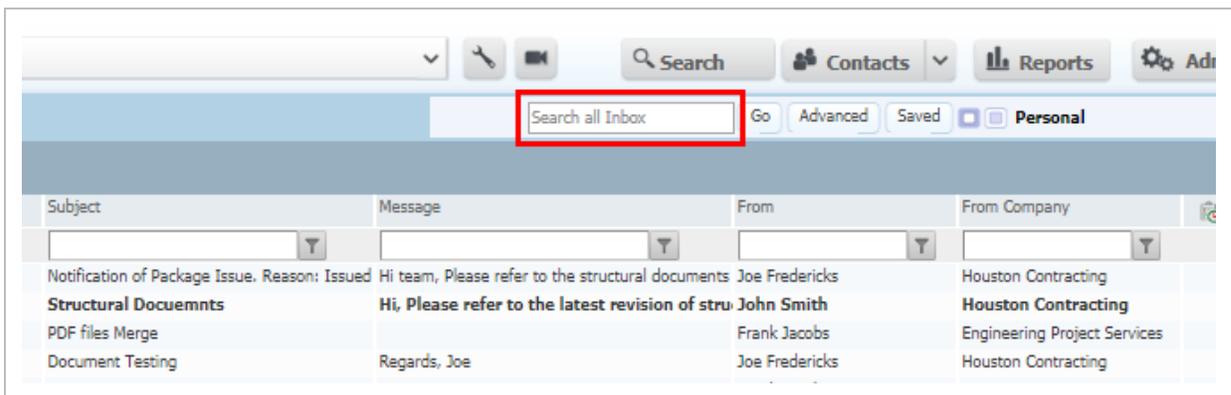
2. Use column filters by entering a text string into the box in the column header and click the icon to the right of the box to choose the filter type. Use the **Clear** link to remove the search filter.

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.
To:	Select a Company or Person from the drop down list.
From:	Select a Company or Person from the drop down list.
Type:	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	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 | • To save advanced search settings, click **Save** and enter a Title for the saved settings. You can then use the **Manage** button to load a previously saved search or use the **Saved** button at the top of the transmittal registers.

 • To share the current view of the Transmittal register with an Advanced search active, select **Generate Hyperlink for the current register** from the **More** button list of options. Then choose **Copy to Clipboard** and paste as required. Results filtered using quick search or column filters will not be included in this link. |

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CHAPTER 5 – MANAGING TRANSMITTALS

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**.
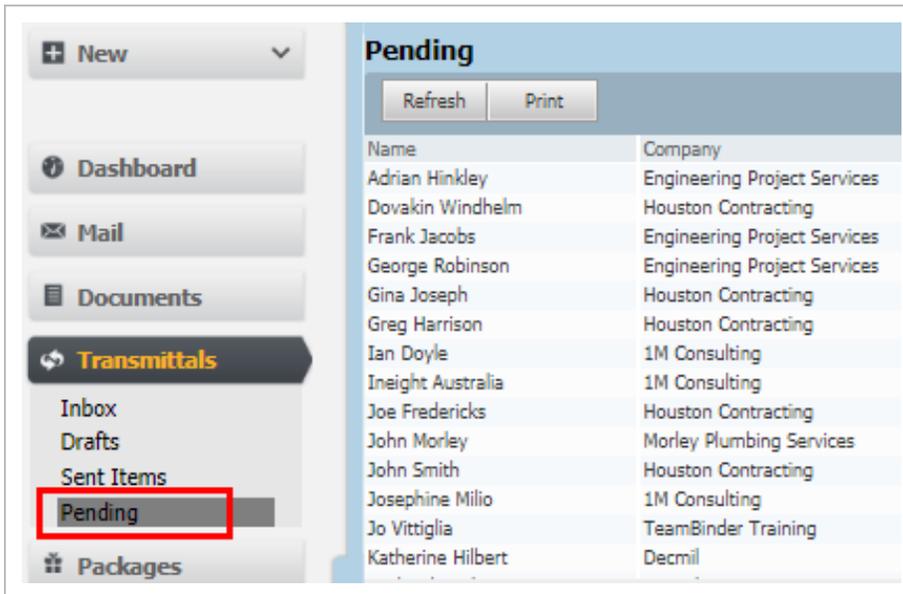
2. The default view is **By Recipient**, this shows a list of Recipients in the upper window who have superseded documents.
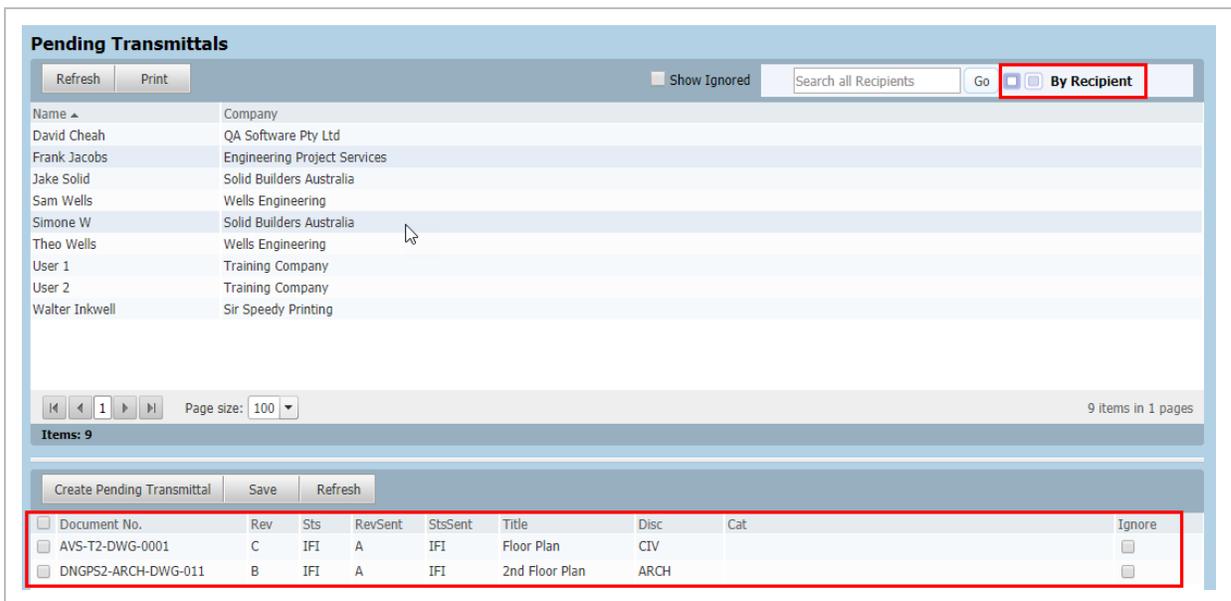
3. Click on a recipient. The lower part of the window will show the document(s) revision transmitted to the recipient and the current revision available (not transmitted).

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.

| NOTE | • 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. |
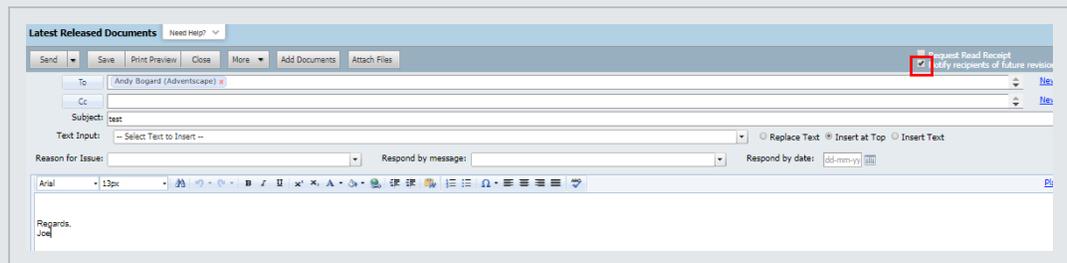
• Pending transmittal visibility is based on access settings.

5.2 TRANSMITTING REVISED DOCUMENTS

To transmit Revised Documents using the Pending Transmittal concept:

1. Click **New**, select **Transmittals** then **Latest Revised Documents**.
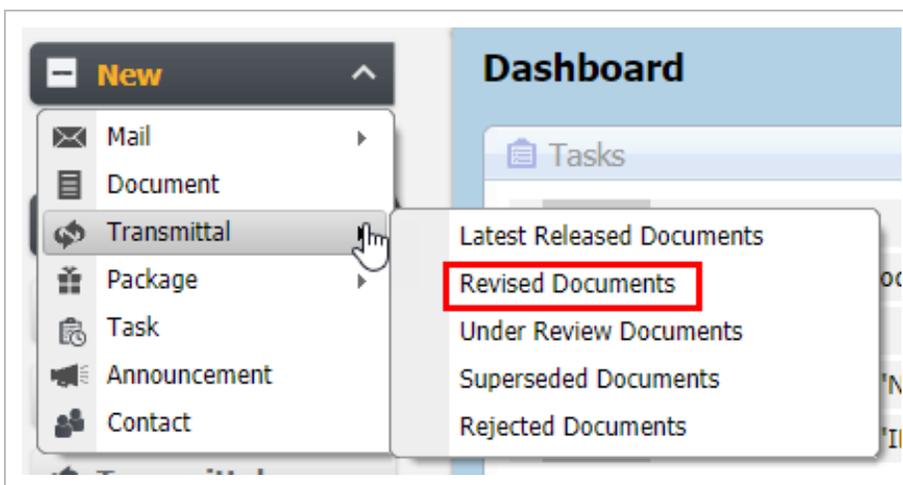
2. Select the **Recipients**. Only recipients from pending transmittals who have not been notified about revisions to documents they previously received via transmittal will be displayed.

3. Choose to **Notify recipients of future revisions automatically** (if applicable).
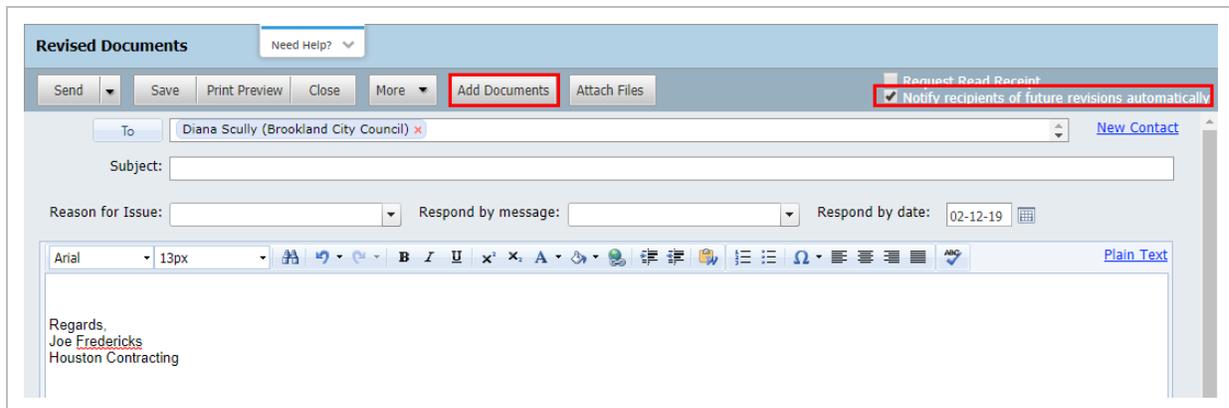
4. Click the **Add Documents** button.

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**.

NOTE	• 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.

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.

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.

NOTE	• 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**.
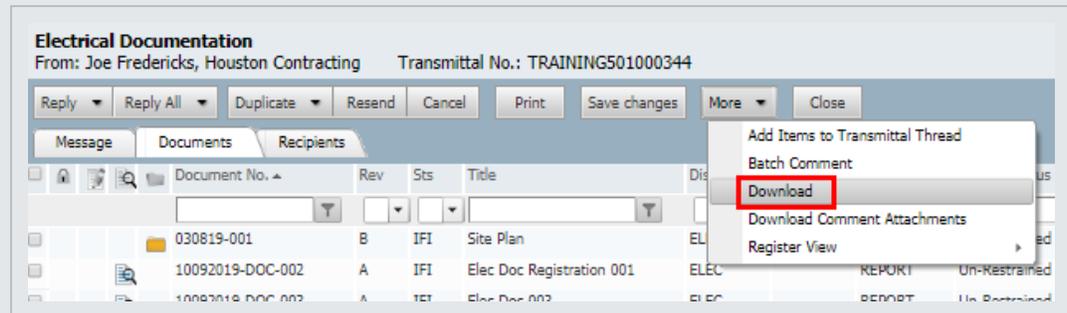
- On some projects it is possible to bulk print the view files related to the transmittal from the documents tab. This feature must be enabled by InEight – contact your account manager.

- 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.

4. Complete the transmittal then **Send**.

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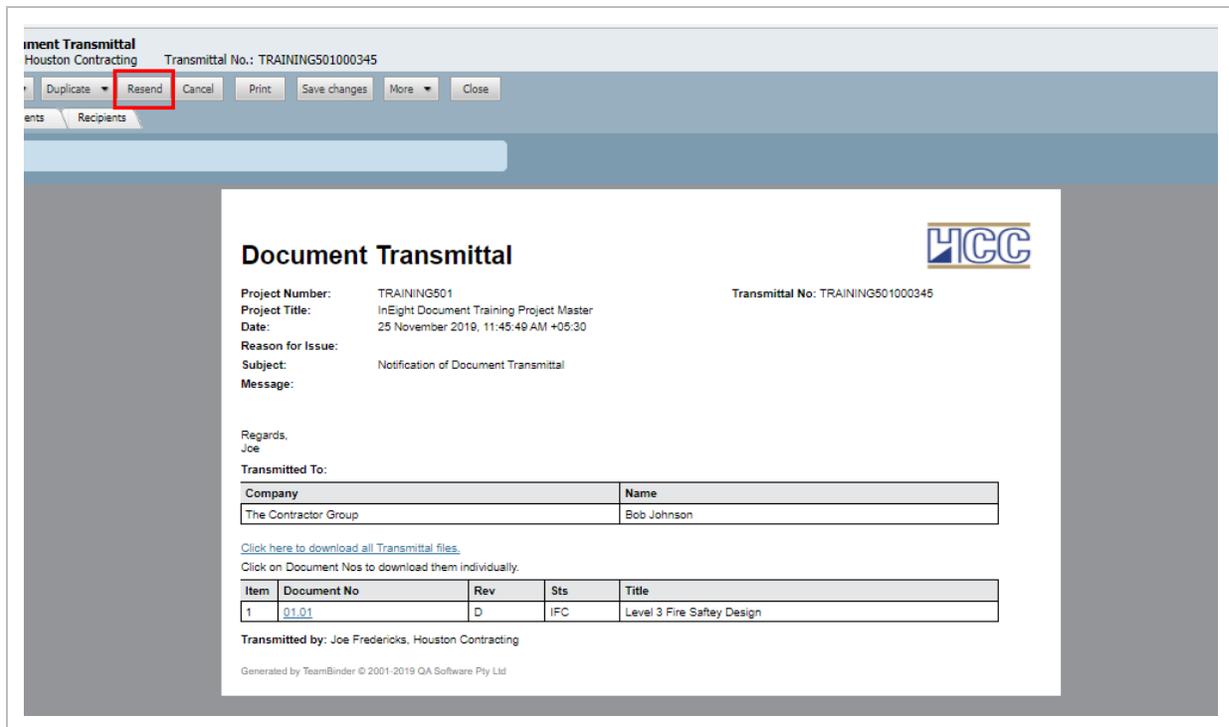
4. Select the recipients you wish to resend the transmittal to then click the **Resend** button.

> **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**.
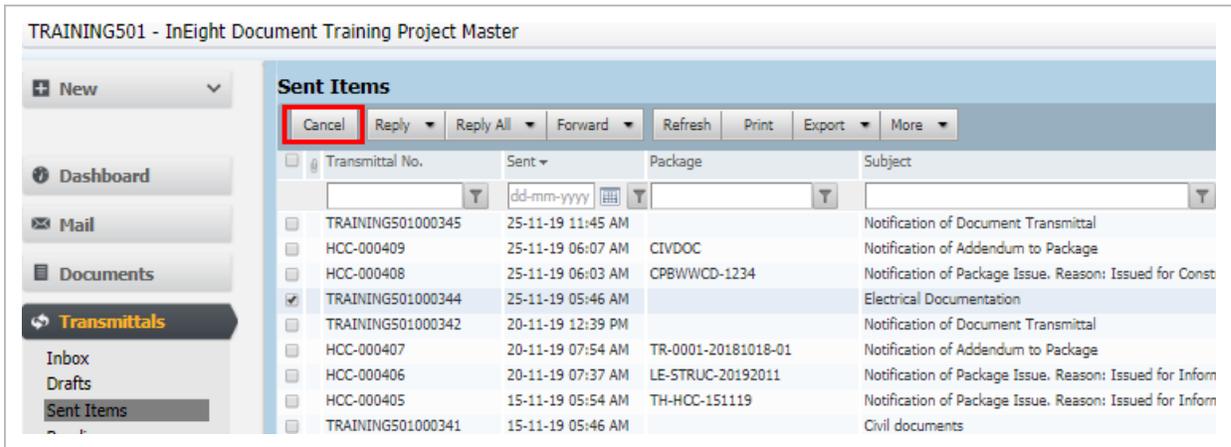
3. At the Cancel Transmittals window enter a **Reason** for cancelling the transmittal. If the reason is the same for all transmittals being cancelled, tick the **Apply same reason to selected transmittals**.
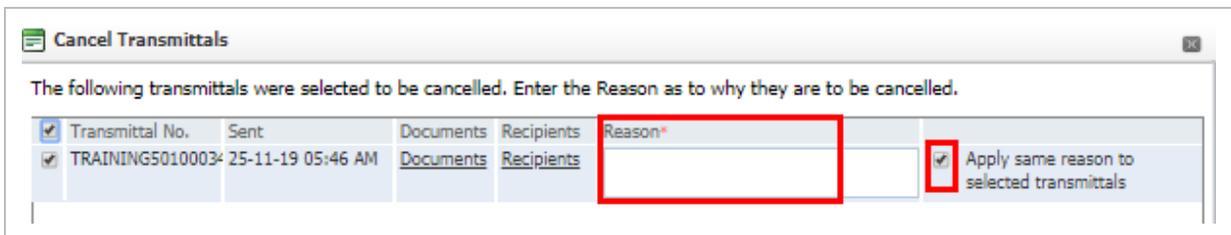
4. Recipients of the transmittal being cancelled will be notified via the option **Notify the transmittal recipients that the selected transmittals have been cancelled**.
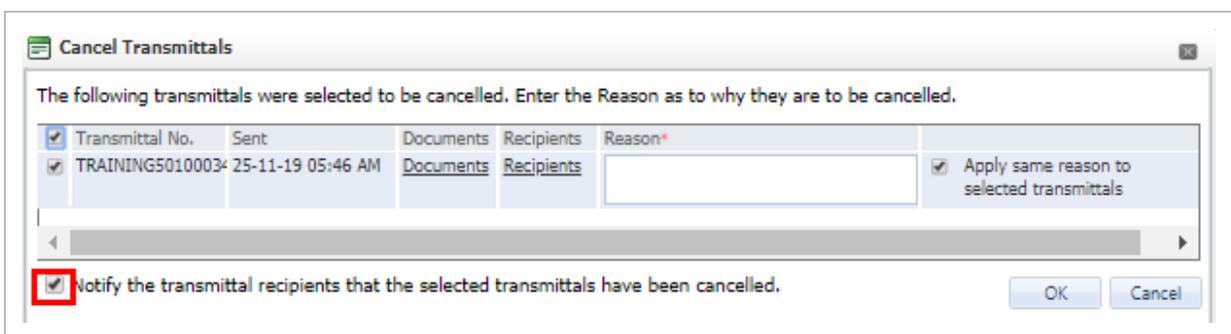
5. Click **OK**.

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 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**.
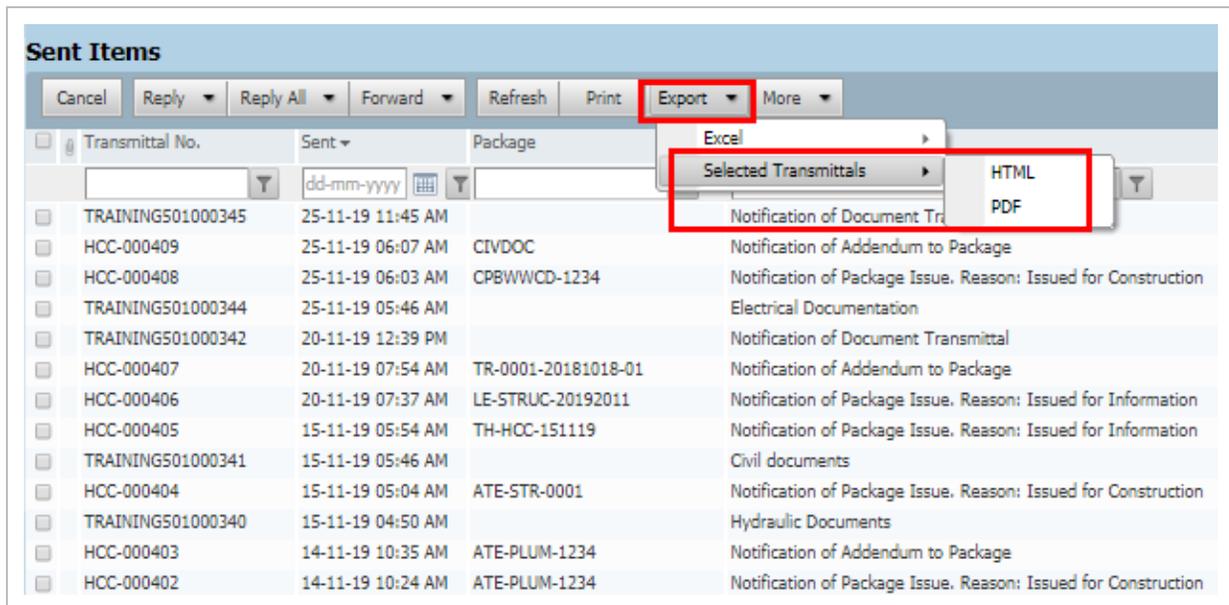
3. If the InEight Document privacy statement appears, click **Yes** to continue with the download.

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**.
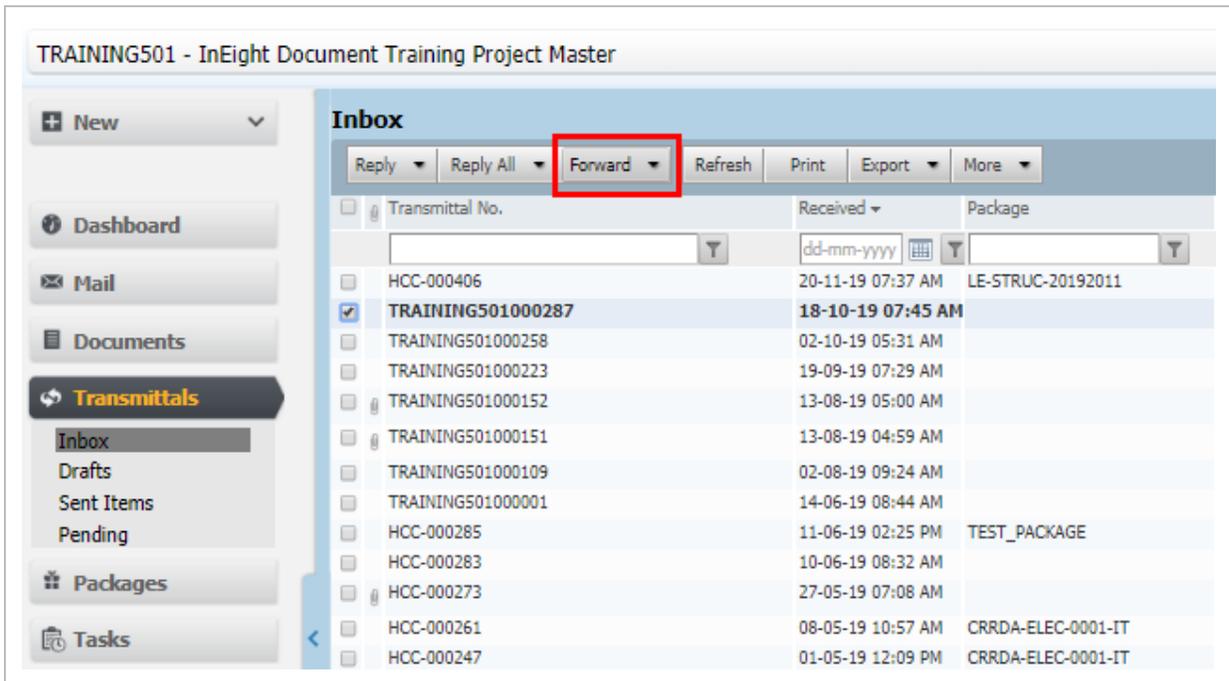
3. Complete the transmittal as per normal.

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**.