Engineering Transmittal Management Module

Our Engineering Transmittal Management Module provides organizations with a faster way to transmit documents from one party to another, making communication with vendors, customers, and downstream contractors simple and intuitive, while keeping an audit trail of communications with the third parties. Overall, it helps companies manage and report on these communications in an organized manner that can be easily tracked by document management system administrators, ensuring each files is going where it needs to go.

The Engineering Transmittal Management module automates the creation, tracking, and reporting of formal transmittal packages for vendors, contractors, and other third parties. It allows you to easily set up transmittal cover sheets with technical and associated files, and is a closed-loop process that tracks acknowledgement and changes by recipients, including an integrated review and approval action process. Our engineering transmittal module makes it easy to send transmittals using the documents residing in the system, eliminating the need to download files and documents from the system before sending them to third parties. Simply select and incorporate drawings, specifications, contracts, and other project-specific files in a simple package that can be delivered by email or other offline means.

Module Key Features and Functions

- Send files, links to files, and/ or a consolidated PDF of all documents, including a cover sheet and choose where they are stored

- Request confirmation notifications

- Use tailored transmittals templates for cover sheet creation, including corporate logos and layouts

- Copy previous transmittals, or make from scratch

- Create transmittals from existing document/ drawing sets/ packages with a preset list of actions needed and delivery options

- Limit transmittals to specific projects

- Provide version integrity to ensure file links always connect to applicable document versions

- Add custom fields to transmittals and cover sheets

- Permit non-user email contacts

- Freeze or lock transmittals once sent to prevent further updates from occurring

- Auto-create unique transmittal names/ numbers or use naming rules driven by custom data fields

- Include validation rules to ensure transmittal is complete/ approved before being able to be sent

- Track and report on all outgoing and incoming emails and events/ changes and bounced emails

- Limit the size of transmittal attachment files that can be emailed

- Prevent the transmittal from including any files not in the associated project

Easy Transmittal Creation

Creating transmittals is an intuitive process, as many of the transmittal fields have dropdown arrows ensuring consistent tagging in searches. Users can even create transmittal templates, which can be used over and over again for similar projects or similar vendors/ customers. Better yet, if you don't want to create a new transmittal name each time, the system will automatically generate a unique name for easy and organized searching.

Transmittals are associated to specific versions of documents and drawings, and are locked from being deleted while an associated transmittal remains in the system. This ensures complete and accurate audit trails for specific transmittals. The system also tracks updated transmittals as new file versions are delivered to vendors/ customers.

Engineering Transmittal Database Fields

The module allows users to provide project-related information to describe the contents of the transmittal. To avoid the need for further clarification, users are able to include details such as:

- Transmittal Name
- Project Name
- Due Date
- Create Date
- Email Subject Line
- Comments/ Remarks
- Recipient Details
- Sender Details
- Confirmation Requirement
- Transmittal Contents
- Associated Documents
- Transmittal Status

In addition to standard fields, transmittals can include custom fields that contain important status or project information such as name and number, vendor/ customer name, and package identification.

Transmittal Cover Sheets

Transmittal cover sheets are built using a Microsoft Word add-in. Users can employ the default template, and revise it as needed. Cover sheets can include almost any text, pictures, images, and company logo in the transmittal template, using any layout they choose. Our Customer Support team is available to assist you in creating XML tags and binding the tags to field names.

Transmittal Management

Our engineering workflow and document management system provides users with several options for creating and managing transmittals.

Transmittal via Email

The transmittal module allows organizations to email transmittals, if they would like, and includes From, To, CC, and BCC fields just like your email client. The module allows users to select contacts from the system directory, and even enter users, groups, or contacts that are not system users. Transmittal creators can require transmittal recipients sent a transmittal via email to confirm receipt of the email, which is recorded and tracked within the system. Any confirmations or other communications related to the transmittal can also be sent to internal transmittal contacts to notify them of the receipt, acknowledgement, and approval.

Users can send the transmittal with the native files as attachments and/ or include links to the native files in the cover sheet of the transmittal email, or as a consolidated multi-page PDF file, or any combination of the three. The multi-page PDF includes the cover sheet file and can consist of different file formats all in one PDF, allowing users to include CAD drawings, specifications, manuals, and pictures all in one PDF file.

Finding and Listing Transmittals

An extensive searching capability allows users to find transmittals based on numerous criteria, such as:

- Transmittal Name
- Transmittal Status
- Create and Due Dates
- Recipient and Sender Names
- Associated Files and Documents
- Transmittal Contents
- Other

Status is maintained for all sent transmittals, including Created, Confirmed, Partially Confirmed and more. Lists of Transmittals are displayed in a filtered search window. Any list of transmittals meeting the search criteria can be downloaded to a CSV file with a single click. Several preformatted transmittal reports are also available.

Tracking Transmittals & Change Actions

All actions associated with a created transmittal are tracked within the system. This includes the original email and any received confirmations and a change log that includes any changes, deletions, or additions, as well as property changes such as new revisions. The exact date and time are tracked and the details of each action are recorded.

In addition, a transmittal confirmation log is kept and is available to users. The log maintains all confirmations received against the transmittal, as well as unconfirmed emails. Each confirmation email and any comments are attached to the log creating an audit trail of who confirmed receipt and when the confirmation occurred. The log entry also displays the reply and comments received.

Key Module Benefits

- Provide quick delivery of drawings and documents to contractors, vendors, and customers and ensure the most current files versions are delivered

- Creates a complete audit trail of all communications and tracks when responses to transmittals are overdue

- Prevent issuance of documents/ drawings until they meet release approval criteria

- Save time and reduce administrative staff costs

- Enhance third party communications