Transmittals Quick Reference Guide

This topic provides a reference for the Project Center **Project Transmittals** activity center.

Purpose

Like the paper-based transmittals that traditionally accompany conventional AECO drawing submissions, transmittals in Project Center provide descriptive information about the documents being sent such as title, sender, purpose, and associated files. Use the **Project Transmittals** activity center to review project transmittals no matter where they originated. You can also send, receive and log transmittals and their associated contents from here. You can view and print each transmittal's information from Project Center using its Transmittal Form.

Audience

Newforma Project Center users.

Key Features

- View, track and manage project transmittals.
- Create outgoing transmittals or log incoming transmittals.
- View and print the transmittal form document and access record copies.
- Compare contents of transmittals to folders, document sets or record copies.

To log an incoming transmittal

You can use the **Log an Incoming Transmittal** task if you are receiving either physical or electronic items that may not be related to workflow in other activity centers.
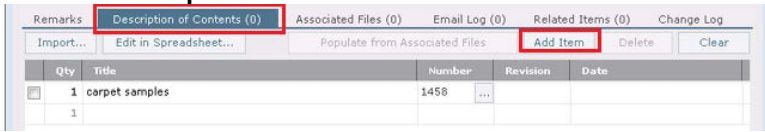
1. From the **Project Transmittals** activity center, select **Log Incoming Transmittal** in the **Tasks** panel.
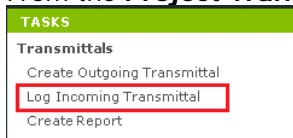
2. Fill in the transmittal form. **Subject** is the only required field.

3. Add any digital files or scans received to the **Associated Files** tab.

4. Use the **Description of Contents** tab to add information about physical items received.

Qty	Title	Number	Revision	Date
1	carpet samples	1458 ...		
1				

5. Select **Log Transmittal** to save.

To create an outgoing transmittal

You can use the **Create Outgoing Transmittal** task if you are sending either physical or electronic items that may not be related to workflow in other activity centers.
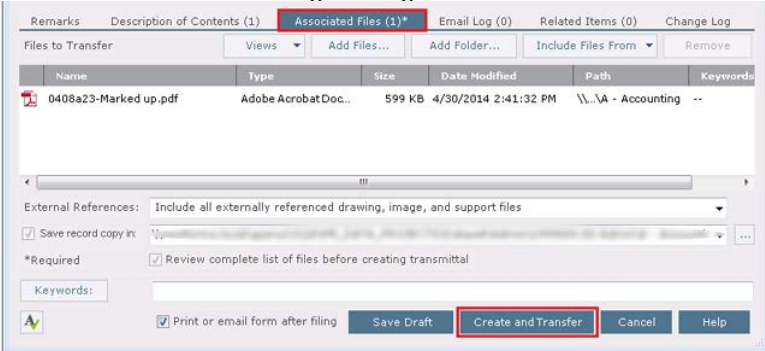
1. From the **Project Transmittals** activity center select **Create Outgoing Transmittal** in the **Tasks** panel.

TASKS
Transmittals
Create Outgoing Transmittal
Log Incoming Transmittal
Create Report
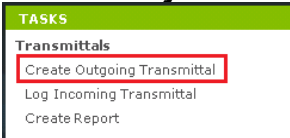
2. Complete the transmittal form. The **To** and **Subject** fields are required.
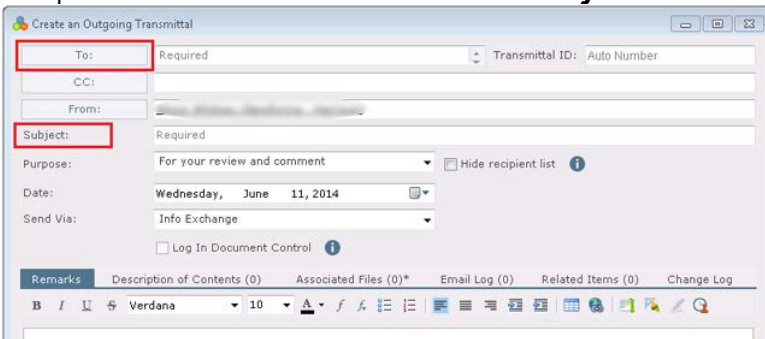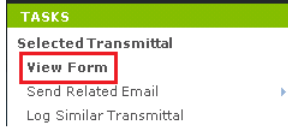
3. If electronic files are being sent, go to the **Associated Files** tab to add them.

4. Select **Create and Transfer** to send the transfer.

To view the transmittal form

1. To view a transmittal form for an existing transmittal, select the transmittal from the log and select **View Form** from the **Tasks** panel.

2. The **Transmittal Form** appears. You can **Print**, or use the **Save As** button to save the file.