Transmittal

What is a Transmittal Document?

The transmittal feature helps you manage the large volume of drawings and specifications that occur in a project. It assists you in keeping track of the drawings, the maintenance and changes of the drawings, which drawing revisions were used in contracts, who needs to receive a copy of updated drawings, and other information required to coordinate them within your project.

Each transmittal document records the items to be transmitted and the people who should be receiving the items.

Who Will Use This?

√ All ePM Users

Creating a Transmittal

Navigate to:  PM Tools > Construction Management > Transmittals

1. Click New to create a new Transmittal.
2. On the Main page, enter the Title.
3. Click the Transmittal Items page.
4. Click Add Existing or Add from Package.
5. Select/review the following for each line item:
   a. Purpose
   b. Action Required
   c. Categorization Code
   d. Confirmed
   e. Confirmed Date
   f. Confirmed Notes
6. Add **Recipients** on the **Recipients** Page.
7. Click **Save**.
8. Select Workflow in the top tool bar to Send.

![Workflow in top tool bar]

Tips

√ Required fields are marked with an asterisk.

√ To reset the document to Draft select the Cancel workflow state.

√ Click on the **Activity Log** tab to view the audit trail of the document.

√ Clicking the online help button provides generic help related to contracts, NOT for the specific uses of GSA’s Correspondence documents.

√ To explode or collapse sections in a document, click on the double headed arrow buttons:

√ Notices with yellow icons require action; blue means a document was forwarded; white means user was cc’d.

√ For additional help and support, contact the Local GSA Regional Point of Contact: