

ePM Quick Reference Guide #126

Transmittal

WHAT IS...

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 the 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.

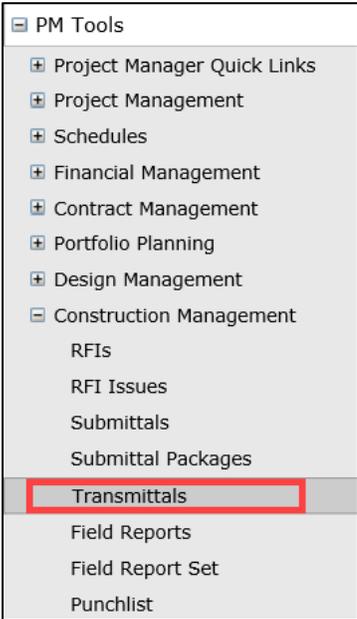
WHO USES...

- All ePM Users

HOW TO...

CREATE A NEW TRANSMITTAL

1. Log in to ePM and navigate to your project.
2. Click PM Tools > Construction Management > Transmittals



3. Click New to create a new Transmittal.

ePM Quick Reference Guide #126

Transmittal

4. On the Main page, enter the Transmittal Title.

The screenshot shows the 'Transmittal: New Document' form. The 'DETAILS' section is expanded, and the 'Transmittal Title *' field is highlighted with a red border. Other fields include 'Number', 'Number of Items', 'Sender Company/Contact', 'Send Date', 'Purpose', and 'Instructions'. The 'Sender Company/Contact' section shows 'Solution Guidance Corp.' and 'Susan Mills'.

5. Click the Transmittal Items page and the Add Existing or Add from Package button.

The screenshot shows the 'Transmittal Items' table. The 'Transmittal Items' tab is selected, and the 'Add Existing' and 'Add From Package' buttons are highlighted with a red border. The table has columns for 'Document Type', 'Document Number', 'Title', 'User Revision Number', and 'Latest Revision'. The table is currently empty.

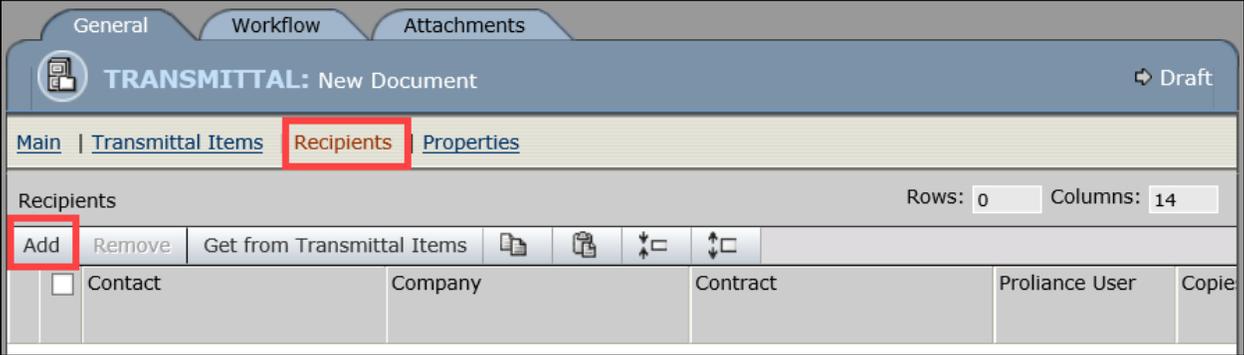
6. Select/review the following for each line item:

- a. Purpose
- b. Action Required
- c. Categorization Code
- d. Confirmed
- e. Confirmed Date

ePM Quick Reference Guide #126

Transmittal

- f. Confirmed Notes
- 7. Add Recipients on the Recipients Page.



- 8. Click Save.
- 9. Select Workflow in the top toolbar to Send.

ePM Quick Reference Guide #126

Transmittal



REFERENCES

Reference the following ePM Quick Reference Guides (QRGs) for additional information. QRGs can be accessed through the [ePM Portal](#).

- QRG 01 – Navigating ePM
- QRG 02 – Using the ePM Address Book