Purpose: The purpose of this document is to establish a process for document and correspondence transmittals.

A. Transmittals shall be used by the Project team to send all correspondence, pay applications, and other items that do not fall into the Submittals, Close-out, or Reporting areas.

*B.* Creation of a Transmittal: Any party in the Project team can prepare a Transmittal in Prolog.

*1)* Items that are called out as submittals in the Div 01 documents or in the specifications should be submitted through the Submittal modules.

*2)* Items called out as Close-out requirements in the Div 01 documents or in the specifications should be submitted through the Close-out Register

*3)* Items that are based on Inspections or Testing should all be submitted through the Inspections and Testing module.

*4)* QAQC and Punch List items are all prepared through and transmitted through the QAQC Module and the Punch List Module.

*5)* All other items that are to be transmitted from one party to the other throughout the course of the project shall be sent through the Transmittal Module in Prolog.

C. Below is a detailed review of the required Transmittal Prolog Fields and the responsible party.

1) The row above the tabs will show in all tabs of the module.

a) Date: The date field is automatically populated with the current date.

b) The Reference Number is automatically populated with the next number in the sequence of unused records.

c) Logged as: is a drop down selection field. The options in this field are:

- Construction
- Contract
- Correspondence
- Cost
- Design
- Information
- ODP
- Report

- Sent – Sent is not to be used by any user. This option is for items that are automatically sent out in the system due to cc lists, i.e. RFIs.

  Select the appropriate option that best fits what you are transmitting in general terms.

d) Logged By will automatically populate based on the user entering the Transmittal.

C. General Tab:

1) Transmitted by, Company and Address are all auto-populated based on the user entering the Transmittal

2) To, Company and Address are entered by the party sending the Transmittal. If the To party's name is known all three fields can easily be populated by entering the first 3 letters of the first name and the first three letters of the last name in the "Attention" field. i.e. "lauhar" will pull in Laurie Harris and all of the company information associated with that person.

3) Package Transmitted For: The person entering the Transmittal will check the appropriate box or enter information in the "Other" box at the bottom of this field.

4) Delivered Via: This is a drop down box. The usual entry here is "Electronic Delivery", however, if there are physical items being transmitted, Hand Delivery, Messenger, or other deliver means may be selected.

5) Tracking Number: This is used when Correspondence or other items are sent via Certified Mail, UPS, FedEx, or another sending method that provides tracking numbers.

6) Remarks: Remarks is perhaps the most important field of the Transmittal. It is CRITICAL that the person entering the Transmittal use the first line of the Remarks field to say what they are sending, i.e. *Pay Application No. 5 – Part 2 Contract ABC Contractor*.

   a. DO NOT put "Please review the attached" in the Remarks without first entering the description information and then leaving a space.

   b. The reason for entering the description of what is being sent is so everyone looking at the "All" view in Prolog can easily scroll down the page to see what has been transmitted and if they are looking for a specific transmittal, they will be able to find it easily.

      When this description is not used, you have to open every Transmittal to find what you are looking for.

D. Detailed Items Tab

1) Item Num: This field is auto-populated.

2) Quantity: This field is not required. If you are transmitting multiple copies or physical items, you may want to use this.

3) Item: This is a drop down field the person entering the transmittal will select the appropriate option for each item being transmitted. If you are sending 2 or 3 items they must be detailed in a separate line for each. This selection box is more detailed than the Logged As field on the General Tab and will provide better opportunities for searching, filtering, and reporting.

4) Reference: This field could be used for an additional label, for a document reference number, or left blank.

5) Description: Copy the name of the document being transmitted into this field.

6) Notes: This can be used for providing additional information about the item being transmitted.

7) Status: This field is not required.

8) Transmitted For: This field is not required.

E. Courtesy Copies Tab

1) Use this tab to select people that need to be copied on the Transmittal. This can be a single individual, or Master Plan Document Controls can set up distribution lists if needed.

F. Acknowledgement Tab: This tab is not used.

G. Files Tab: Use the Quick Upload feature to upload all documents for the Transmittal.

H. SubProject Tab: This tab is not needed for Transmittals.

I. Workflow Tab: The Workflow Tab is used for ODP Purchase Orders only.

When the Transmittal is complete and ready to send:

SAVE using the Checkmark in Square icon, SEND using the Triangle icon, and Print / Download using the Printer Icon. You can then “SAVE & EXIT” using the Checkmark in Square icon.