State of New Jersey
Schools Development Authority

Section 5

Transmittals

ORACLE Primavera

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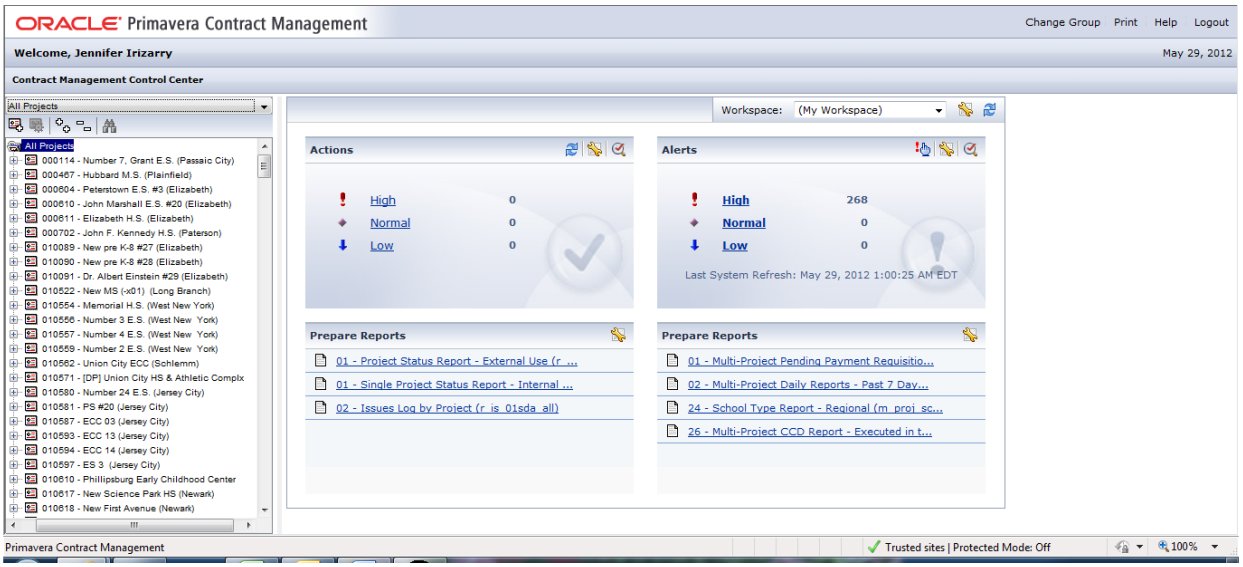
I. Transmittals Overview

A Transmittal is a cover sheet used when sending project documentation. It summarizes what is included in the package, what action is being requested and other package summary information.

Transmittals can be created as individual documents. They are also automatically created during the creation of Submittals and Drawings.

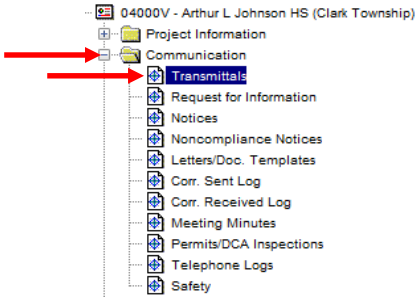
II. Create and Print a New Transmittal

1. Once logged into Primavera, the Contract Management Control Screen appears (as shown).

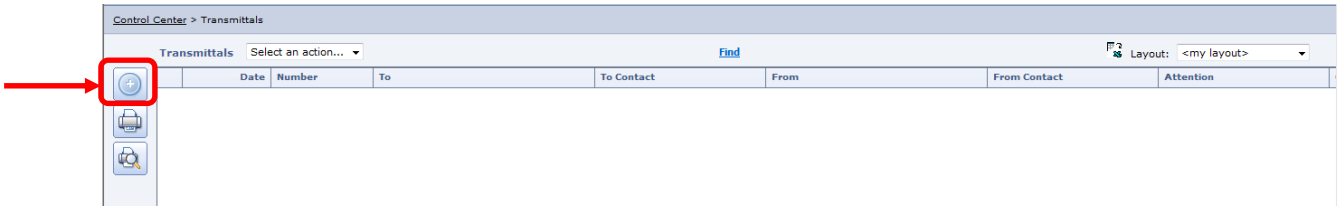


2. Select your desired project.

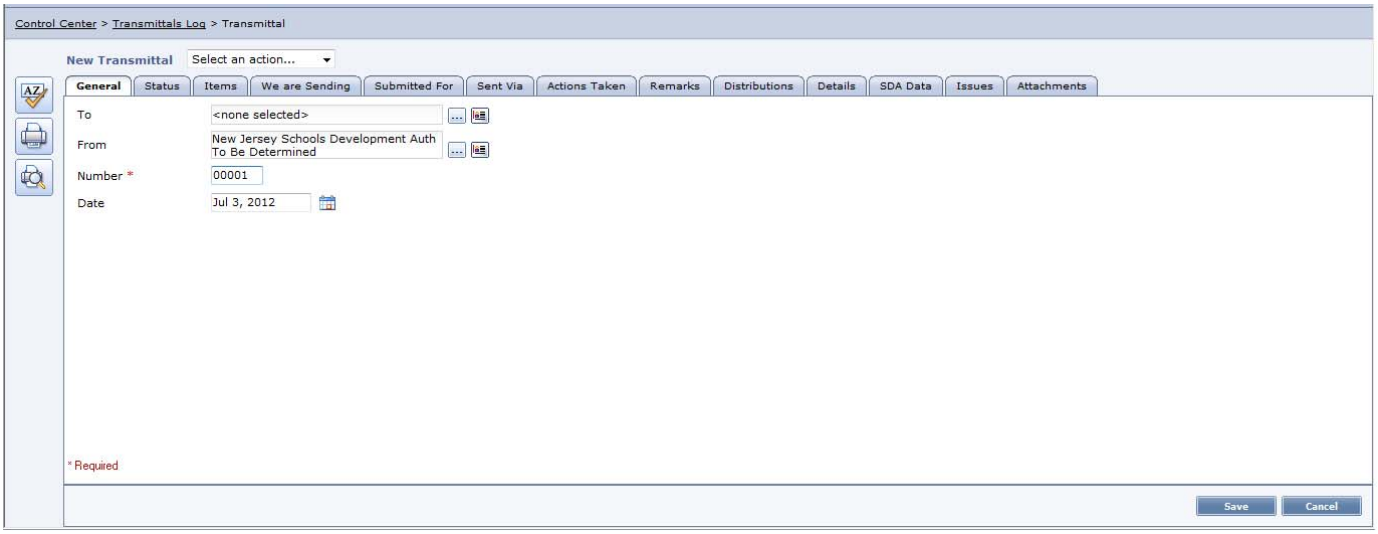
3. Open the **Communication** folder (a list of modules will display) and select **Transmittals**.



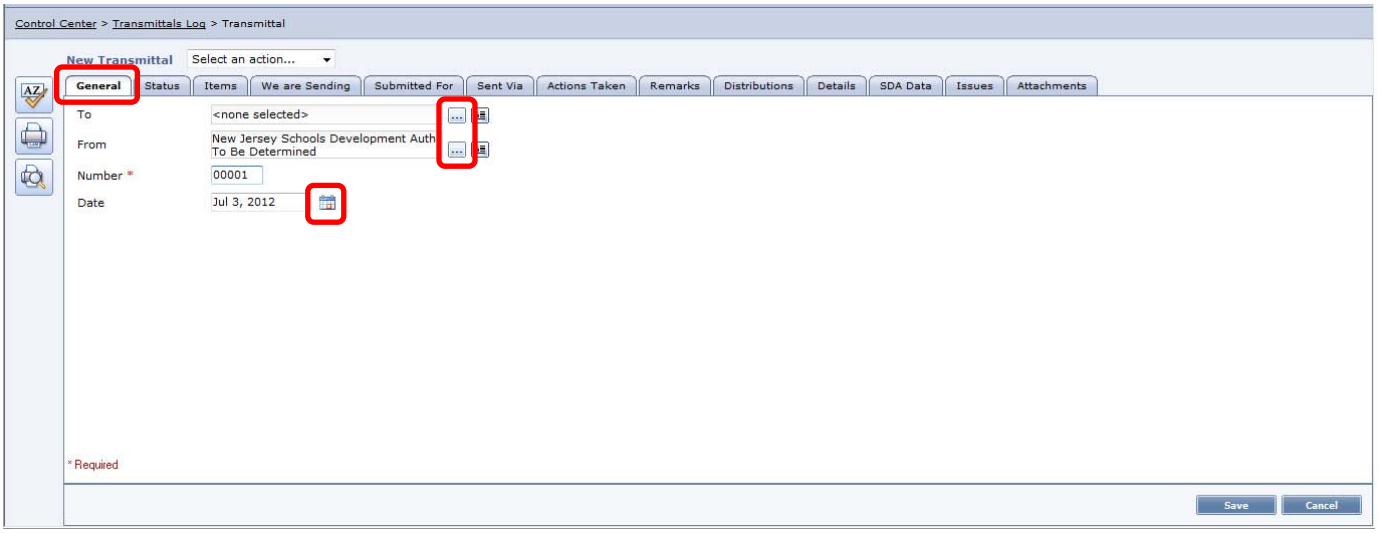
4. The **Transmittals log view** displays. Click the **Add Document** button to add a new Transmittal.



5. A blank **Transmittal document** displays. It is divided into several sections:

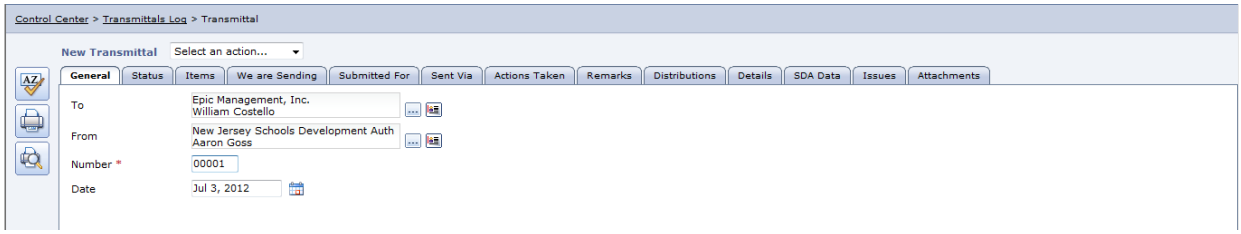


A. General Tab



- **To** – Click the **select** button to choose the name of the person who is receiving the Transmittal.
- **From** – Click the **select** button to choose the name of the person who is sending the Transmittal.
- **Number** – Contract Management will automatically assign a number to this document. Do not change this number. This is a required field.
- **Date** – The current date displays in this field by default. If this is not correct, click the **calendar icon** to choose another date.

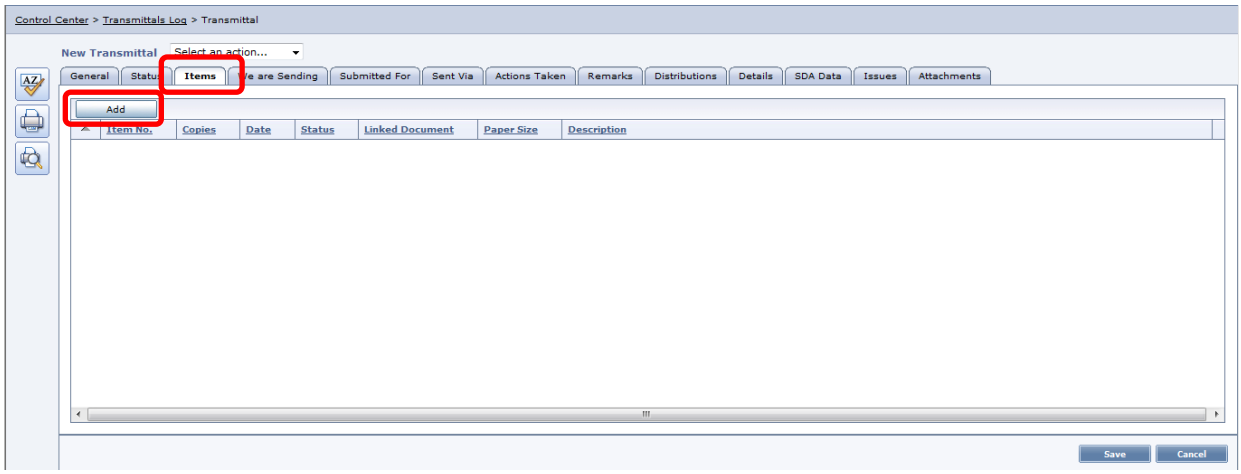
An example of a completed section is shown:



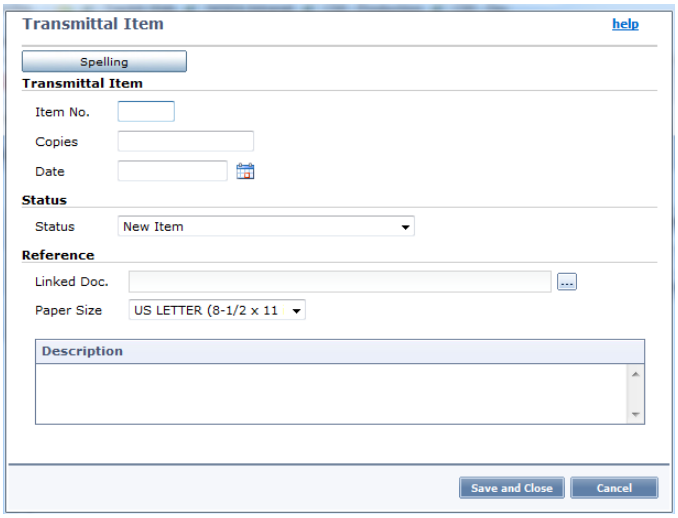
B. Status Tab

- **Ball in Court –** If desired, an overall responsible party for the Transmittal can be chosen by clicking the **select** button.
- **Priority – Normal** is the default, but can be changed to **High** or **Low** as necessary.

C. Items Tab



This is the section where you will define what items are being included with the Transmittal. Click the **Add** button, then complete the fields in the Transmittal Item dialog box.



a. Transmittal Item Tab

- **Item No.** – Enter the identification number of the item. Items can be numbered sequentially or they can reflect the number of a meeting minute or submittal document being included with the Transmittal (5 character field).
- **Copies** – Enter the number of copies being included with the Transmittal (5 character field).
- **Date** – Click the **calendar icon** to choose the date the item was created.

b. Status Tab

- **Status** – **New Item** is the default, but can be changed to another status in the drop down list if desired.

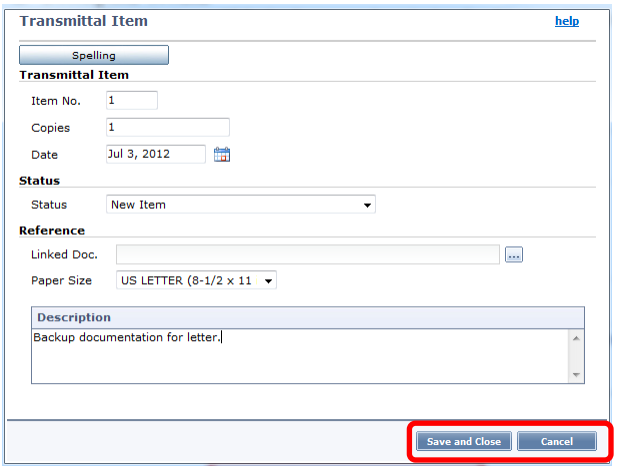
c. Reference Tab

- **Linked Doc** – If this item is related to a Submittal that has already been entered in Contract Management, click the **select submittal** link on the right side of the screen to choose the Submittal from the selection list.
- **Paper Size** – If this item includes drawings, select the paper size of the drawing from the drop down list.

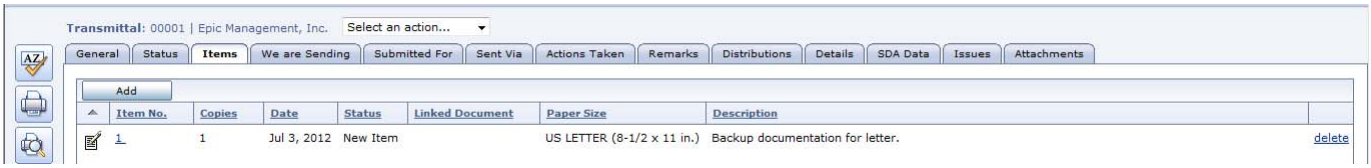
d. Description Tab

- **Description** – If desired, enter a description for this item (4000 character field).

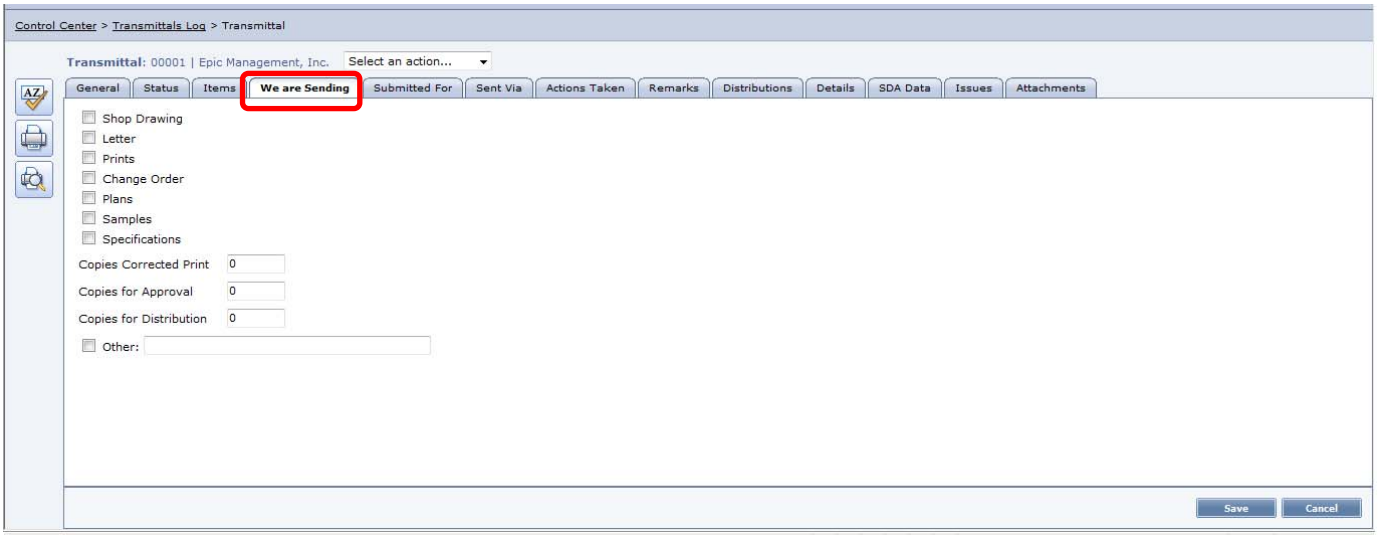
An example of a completed Transmittal Item is shown. Click the **Save & Close** button to return to the Transmittal document or click **Cancel** to cancel the entry.



An example of a completed section is shown. Click the **Add** button to add additional items.

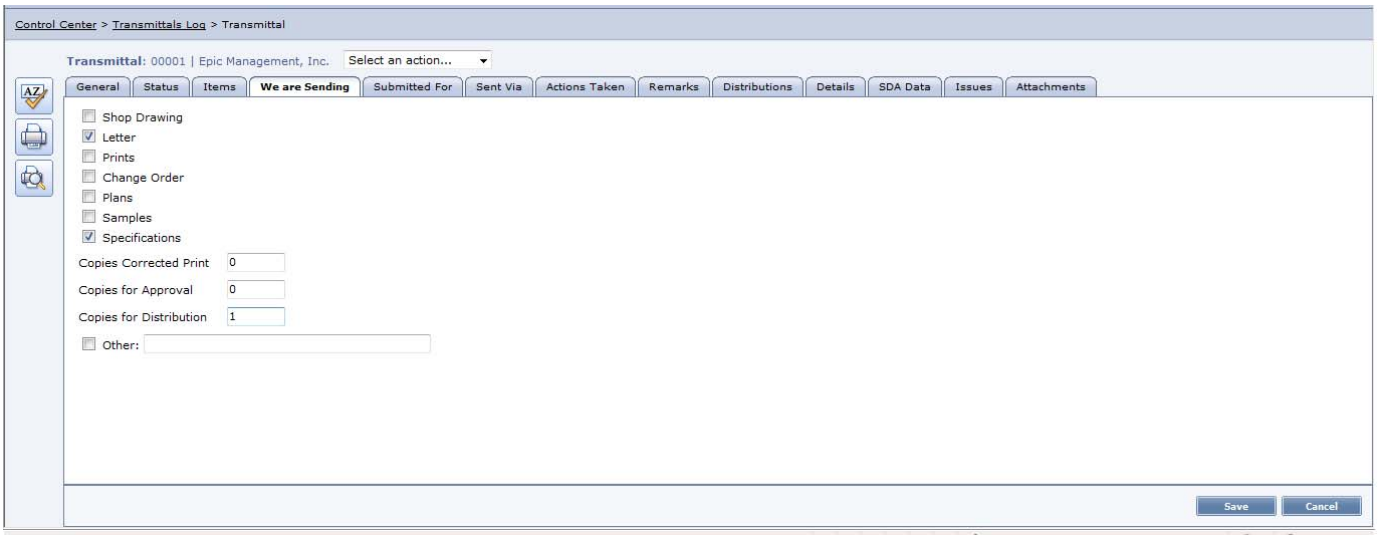


D. We are Sending Tab

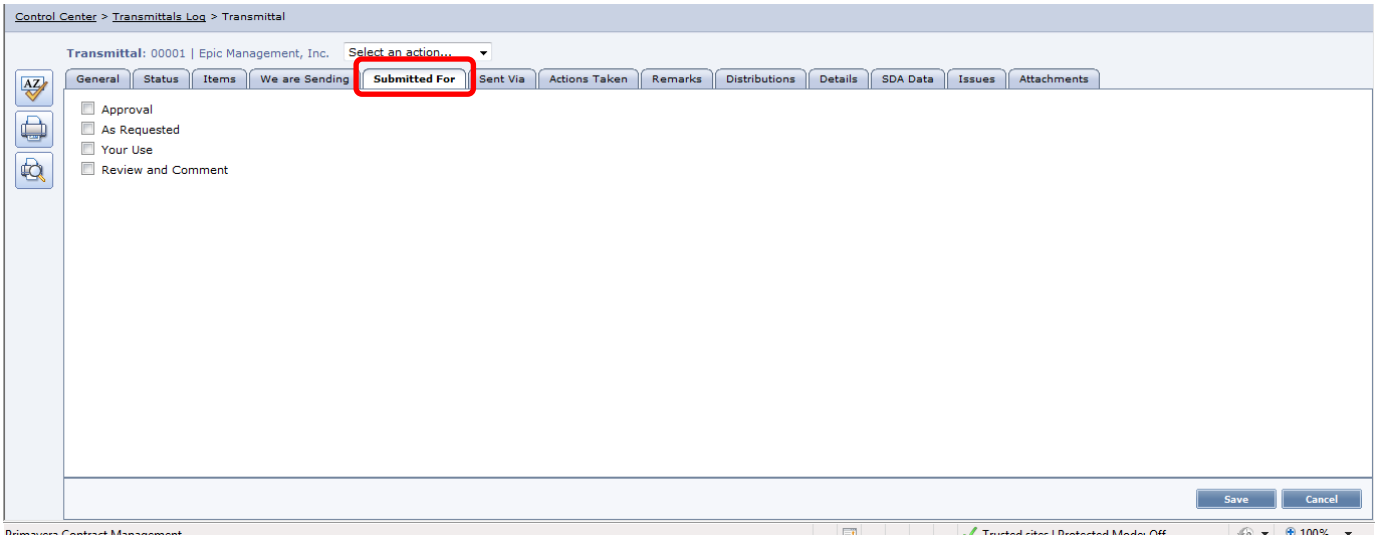


- Mark the appropriate checkboxes to specify what the contents of the Transmittal are, such as **Letters, Prints, Plans, Specifications**, etc. Enter the number of copies for **Corrected Print**, **Approval**, or **Distribution**. If none of the above choices describes the item, click the checkbox and specify your own description in the **Other** field (50 character field).

An example of a completed section is shown:

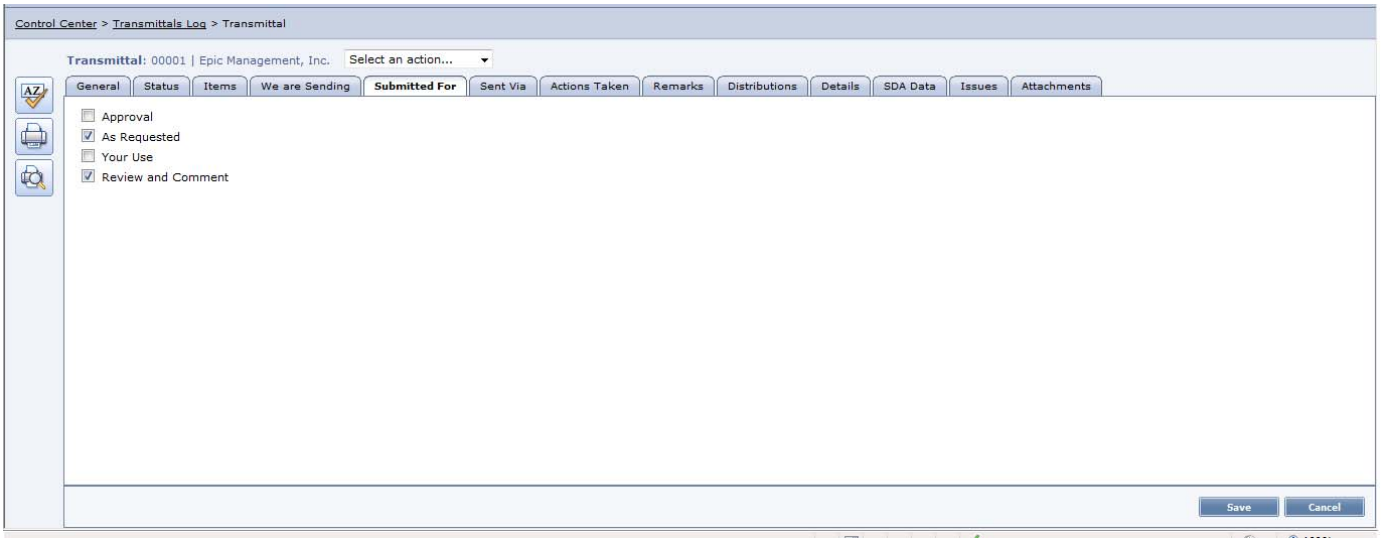


E. Submitted for Tab

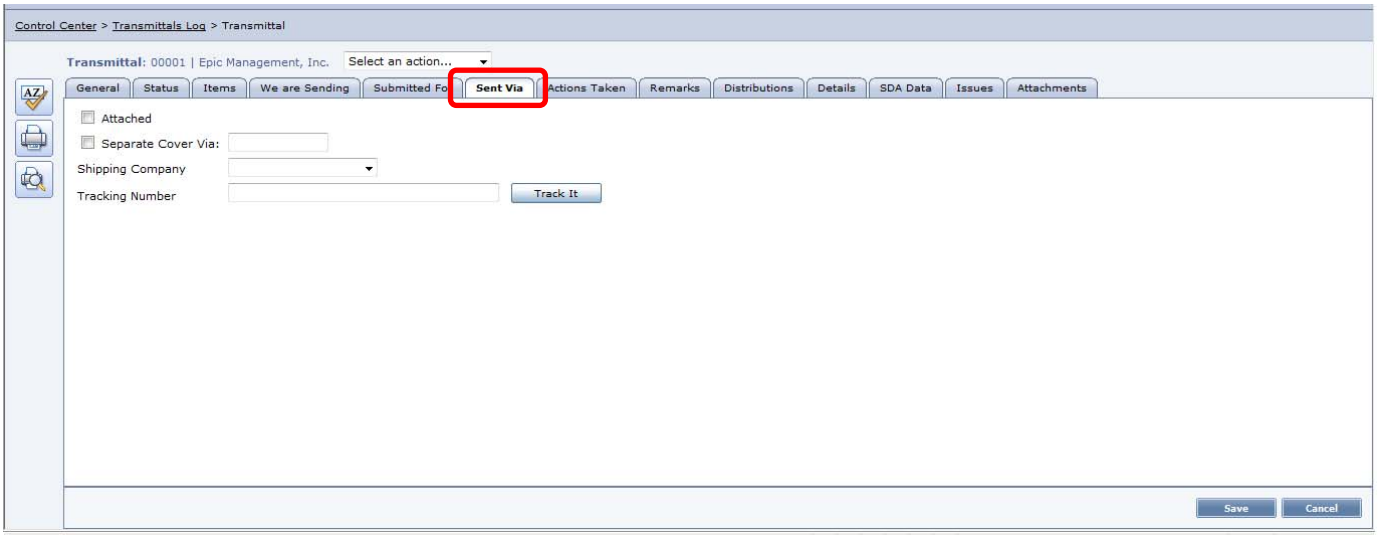


- Click the appropriate checkboxes to specify the reason(s) for the Transmittal.

An example of a completed section is shown.

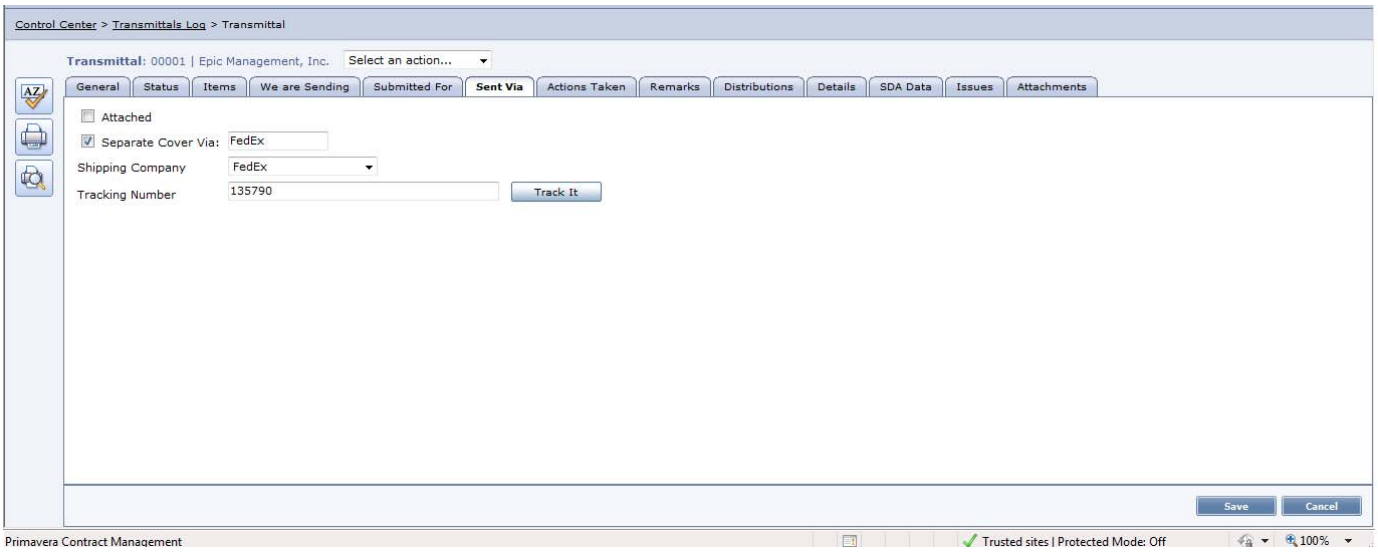


F. Sent Via Tab

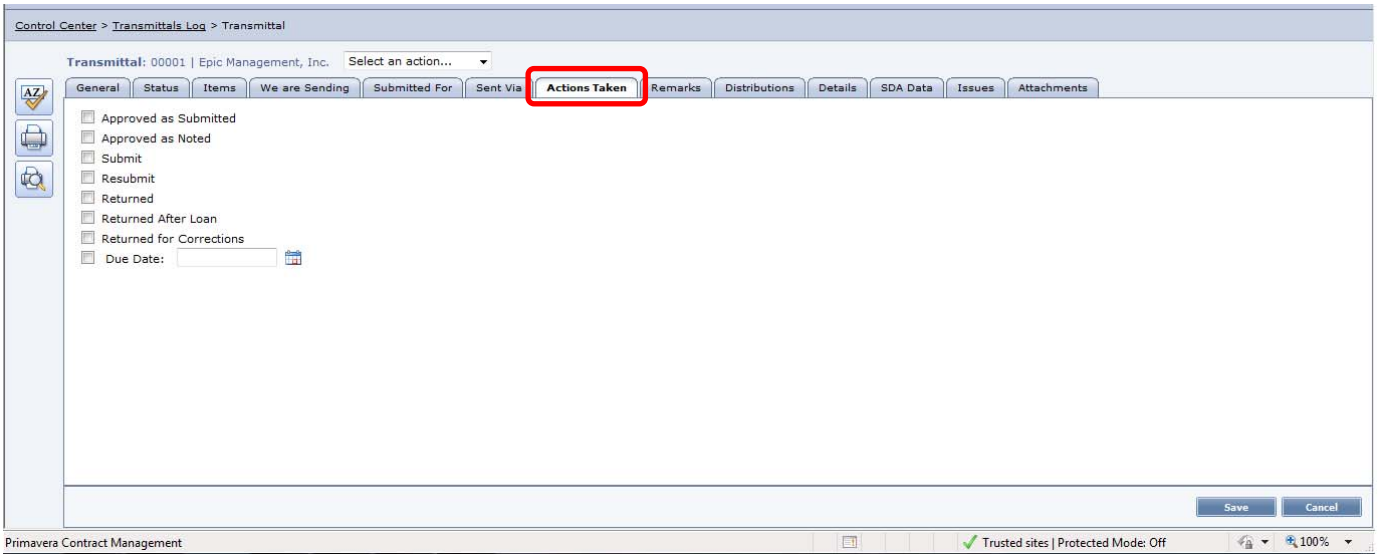


- Click the **Attached** or **Separate Cover Via** checkboxes to specify how the Transmittal was sent. If you click the Separate Cover Via checkbox, enter the method in the field next to the checkbox (22 character field).
- If you want to track the delivery of the Transmittal, select the **Shipping Company** from the drop down list. The choices are FedEx or United Parcel Service.
- Enter the **Tracking Number** (36 character field).
- If you have entered a Shipping Company and Tracking Number, click the **Track It** button to automatically open that company's web site to track the status of your shipment.

An example of a completed section is shown:

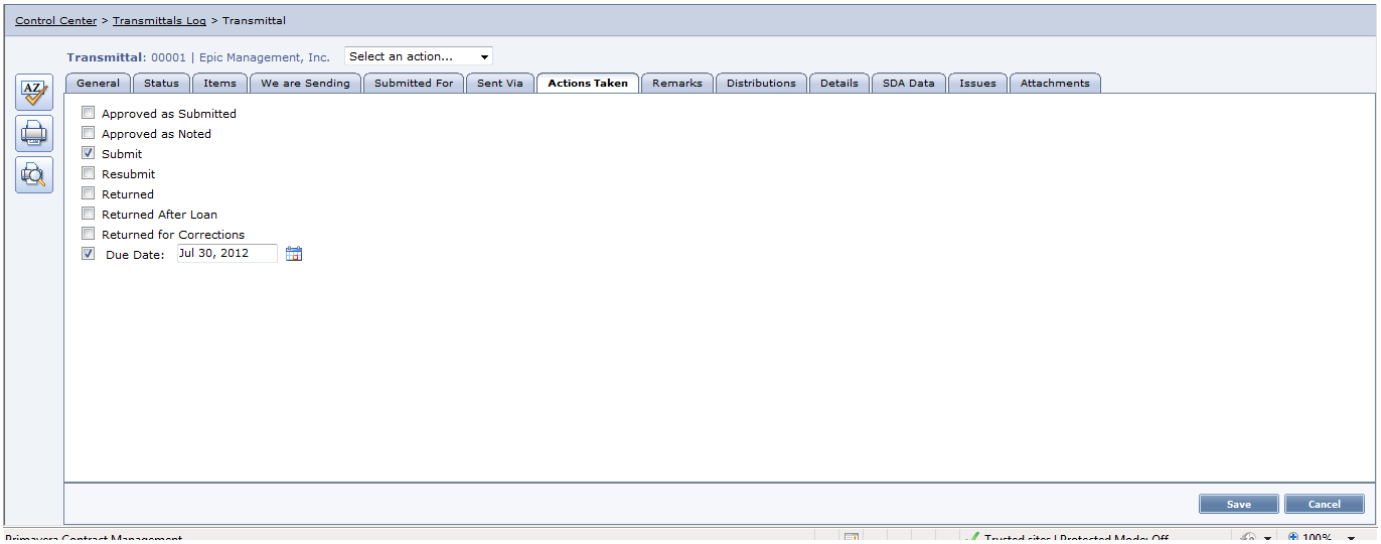


G. Actions Taken Tab

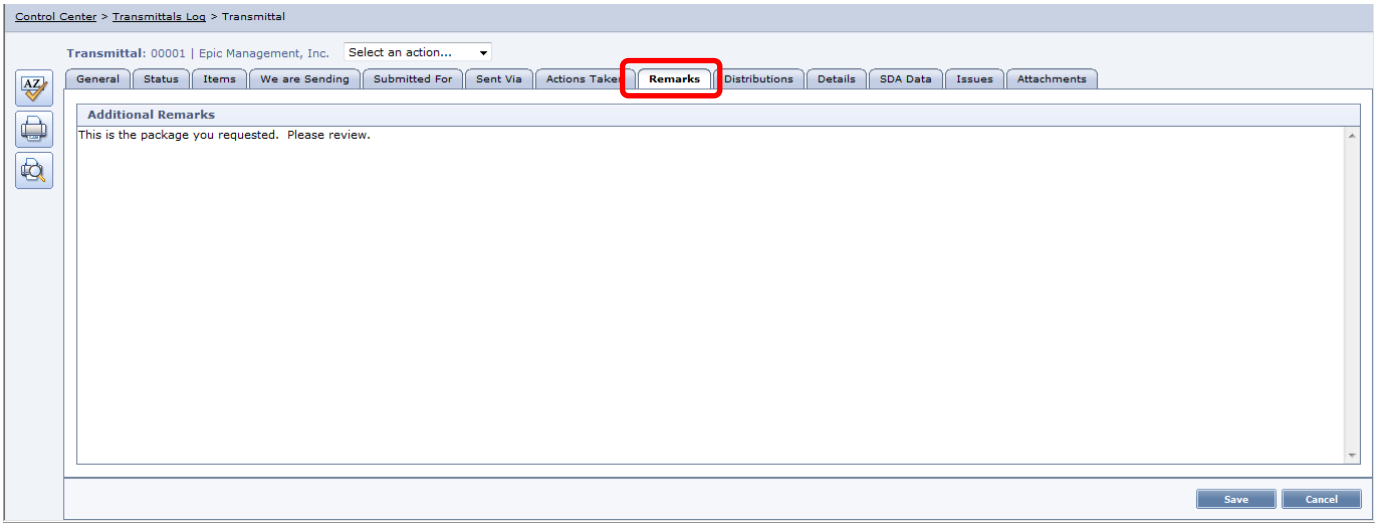


- Click the appropriate checkboxes to specify the actions you are taking, or what actions the recipient must take regarding the Transmittal.
- If you click the Due Date field checkbox, click the **calendar icon** to select the desired date.

An example of a completed section is shown:

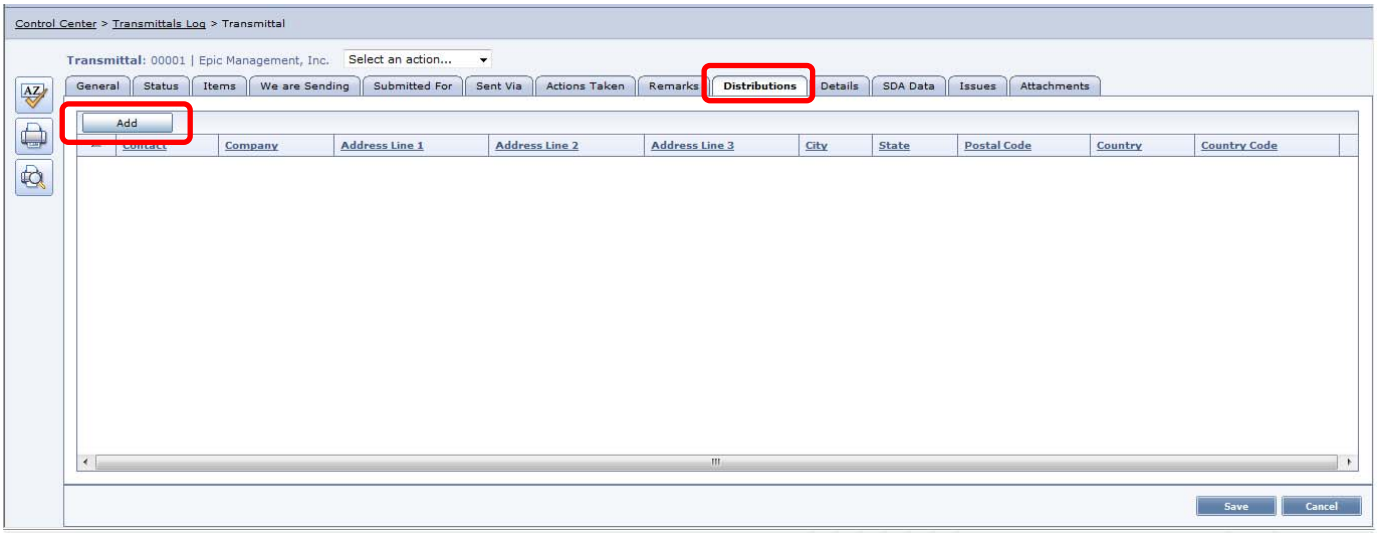


H. Remarks Tab



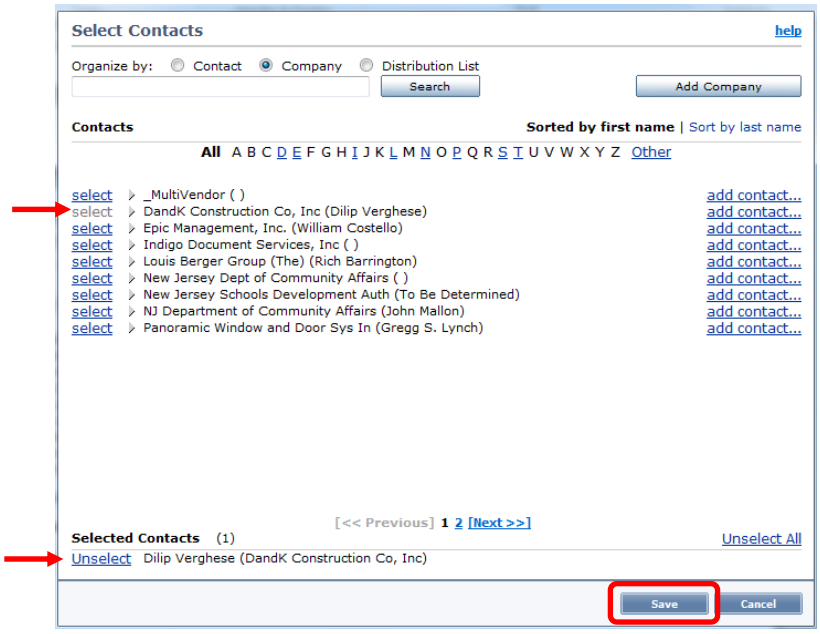
- Enter any applicable comments about the Transmittal (4000 character field).

I. Distributions Tab

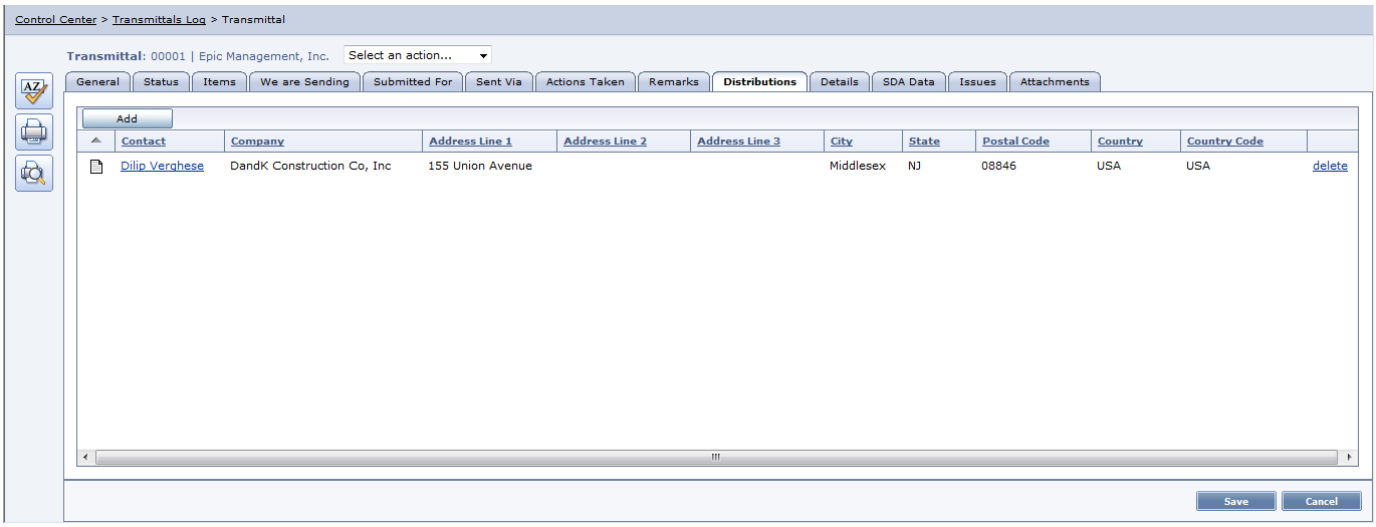


- If there are others who should receive copies of the Transmittal, click the **Add** button to include their names in this section.

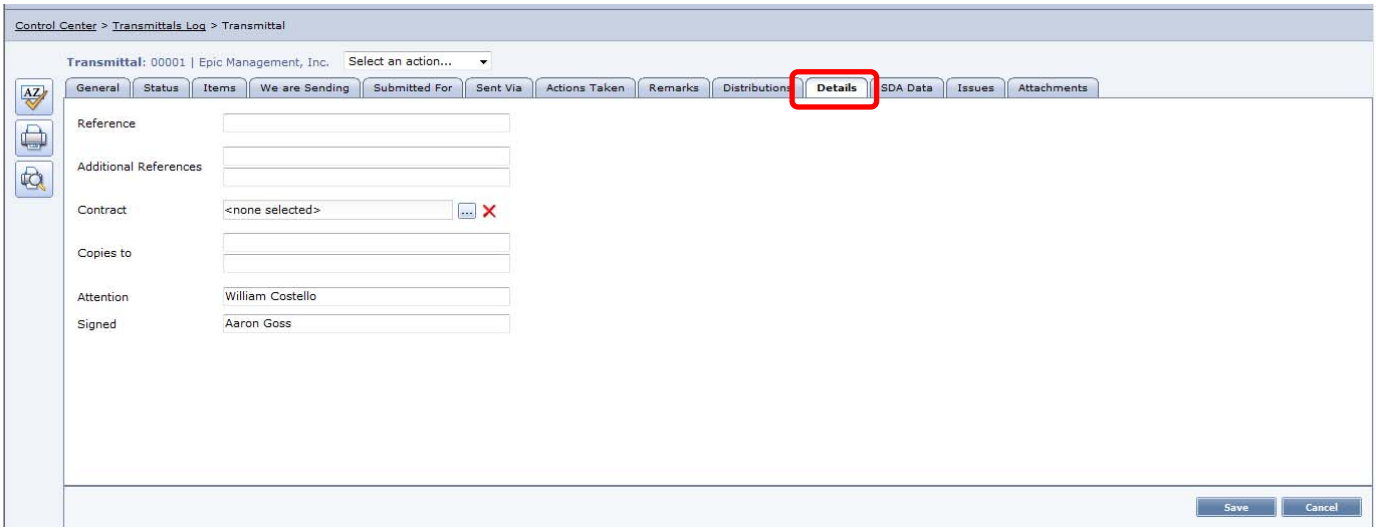
- The **Select Contacts dialog box** displays. Click the **select** link to the left of all desired names. Those names will display at the bottom of the screen. When all names have been selected, click the **Save** button to return to the Transmittal document.



An example of a completed section is shown:

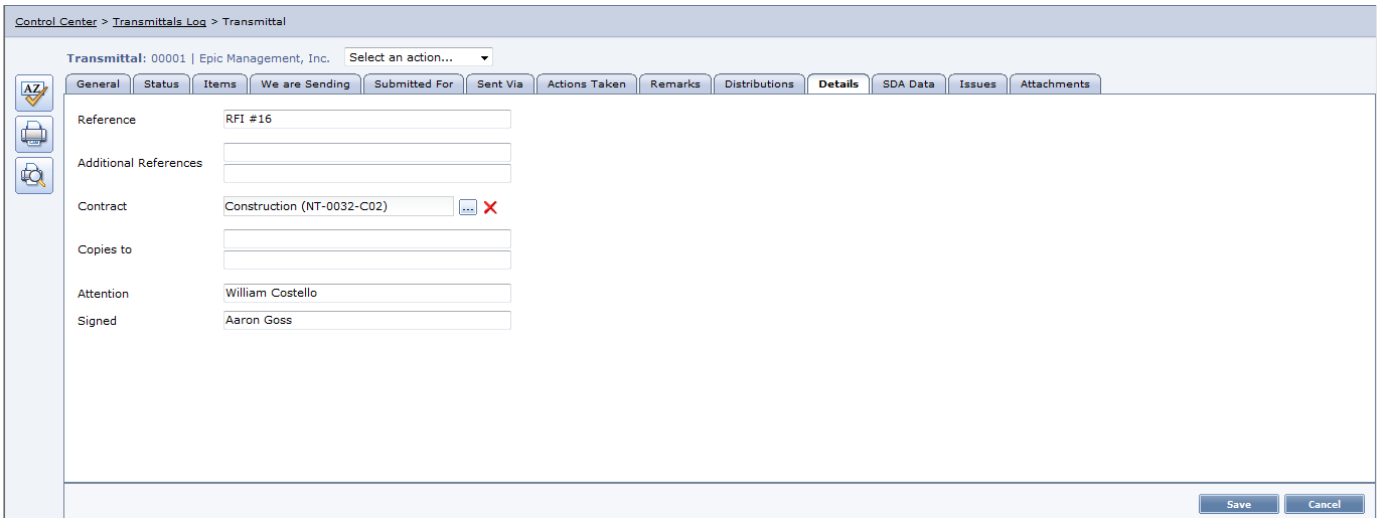


J. Details Tab

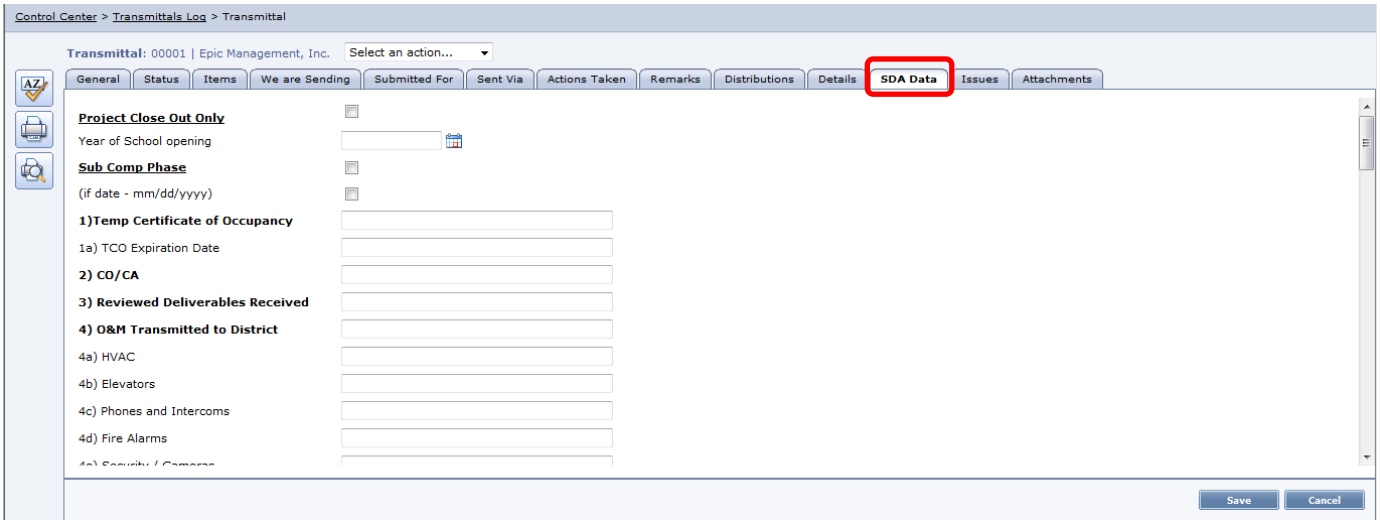


- **Reference** – If desired, enter information about the document(s) associated with the Transmittal (50 character field).
- **Additional References** – If desired, enter information about any additional documents associated with the Transmittal (2 fields, 50 characters each).
- **Contract** – Click the **select** button to choose the associated contract from the selection list.
- **Copies To** – If desired, enter the names of the contact receiving copies of the Transmittal (2 fields, 50 characters each).
- **Attention** – Defaults to the name in the To field, but can be changed by retyping the information (22 character field).
- **Signed** - Defaults to the name in the From field, but can be changed by retyping the information (22 character field).

An example of a complete section is shown:

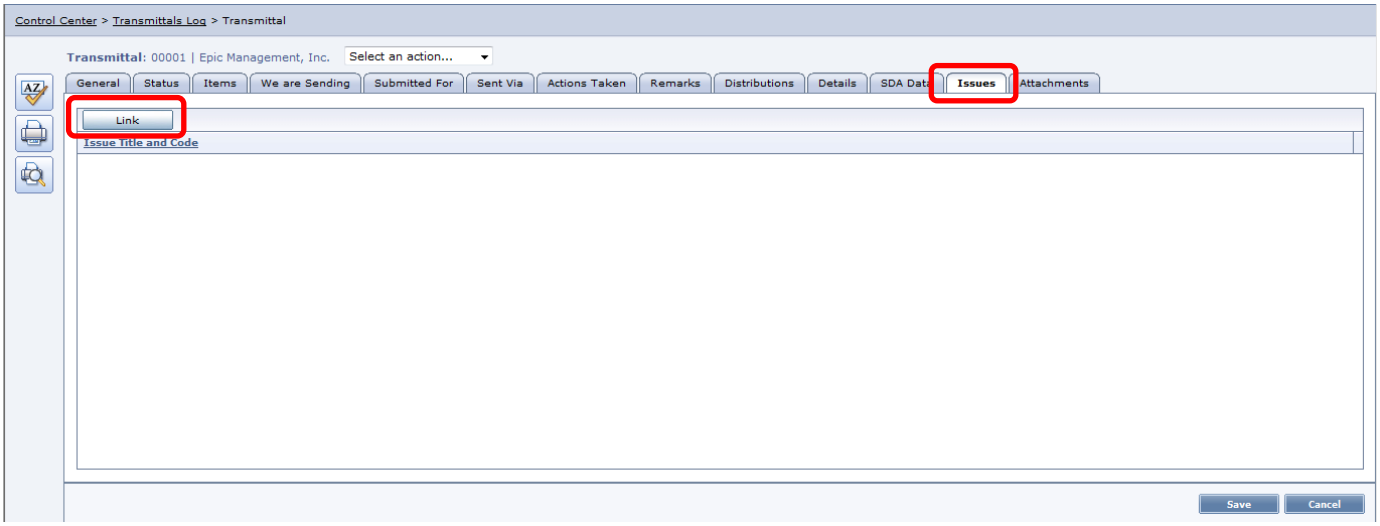


K. SDA Data Tab



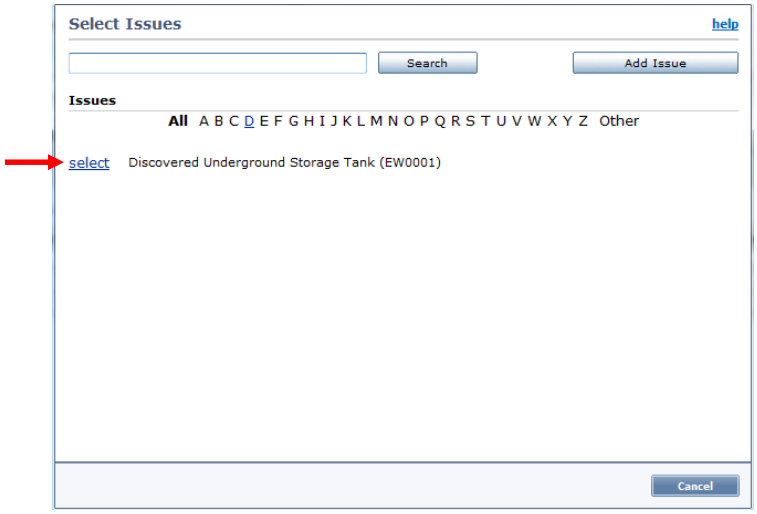
- This section is used to track project close-out information and should not be used when creating a transmittal for submission. Refer to Section 6 Transmittals for Project Close Out for further instructions.

L. Issues Tab

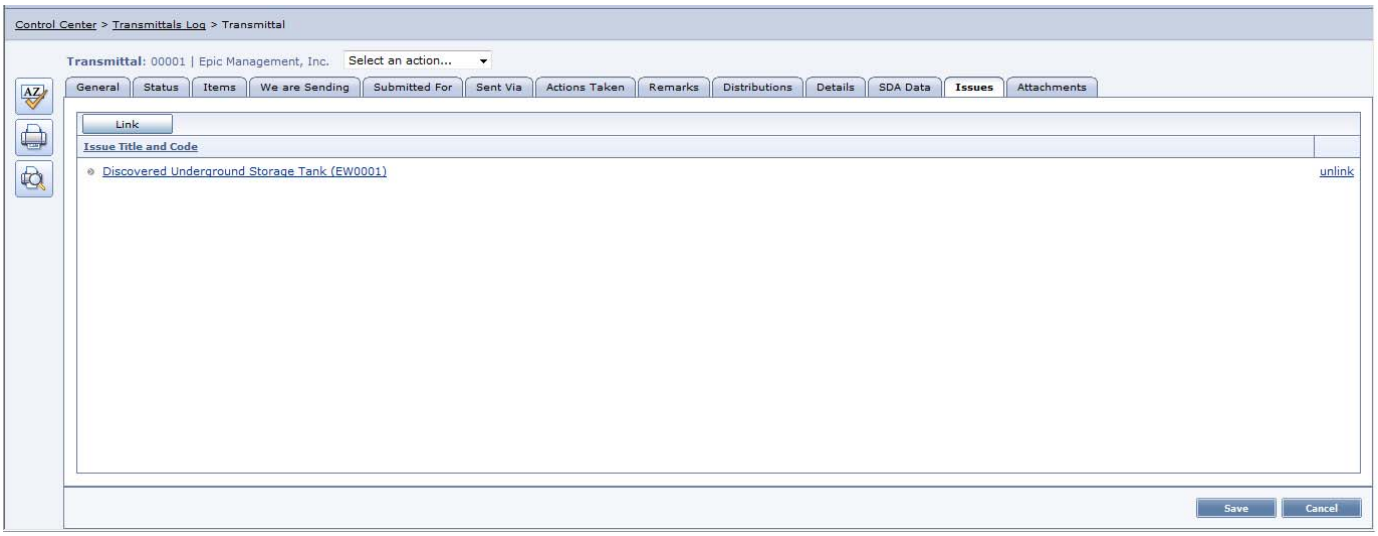


- If this Transmittal relates to an Issue that was previously entered in the Issues log, it can be linked to this document. Click the **Link** button.

- The **Select Issues dialog box** displays. Locate your desired issue and click the **select** link to the left of the issue title to link it to the Transmittal. Once you click the select link, you will return to the Transmittal document.

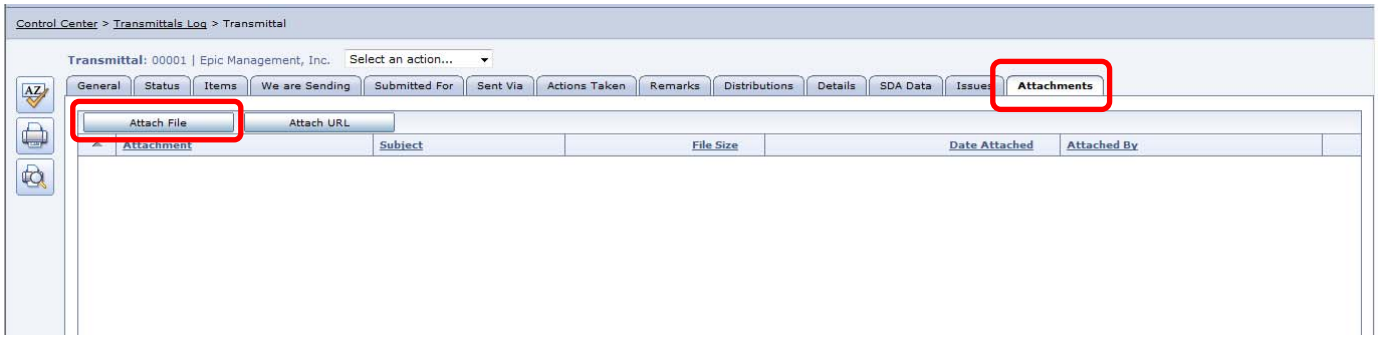


An example of a completed section is shown:

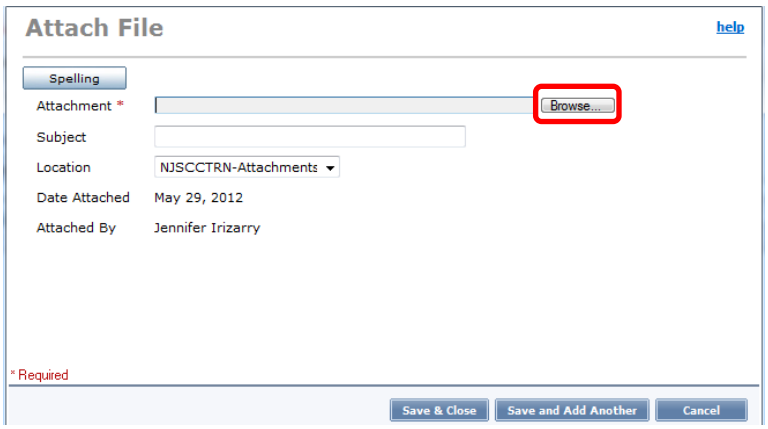


M. Attachments Tab

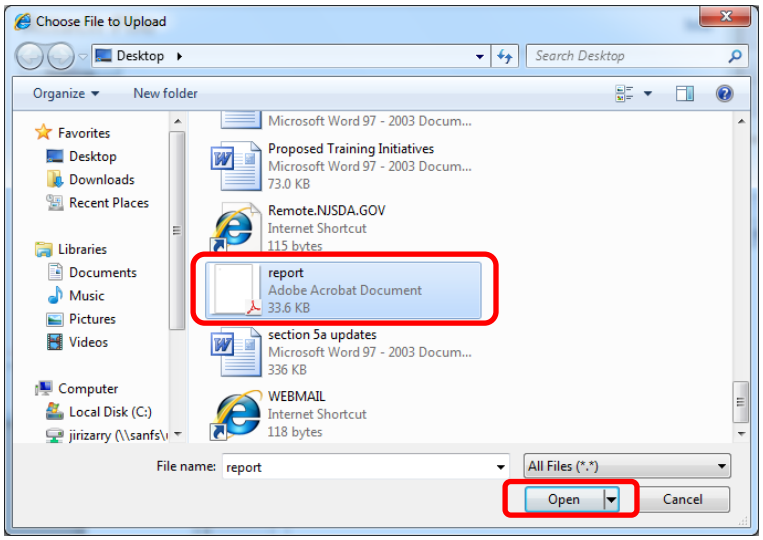
- To attach supporting documentation, click the **Attach File** button.



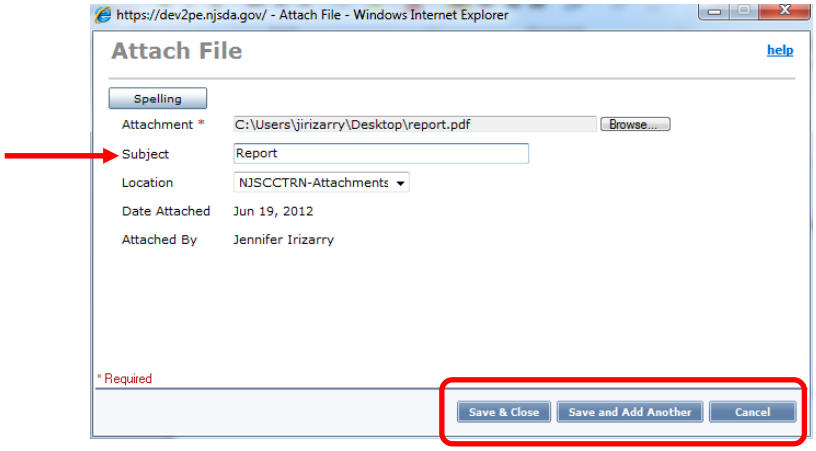
- Click the **Browse** button to navigate to the document you wish to attach.



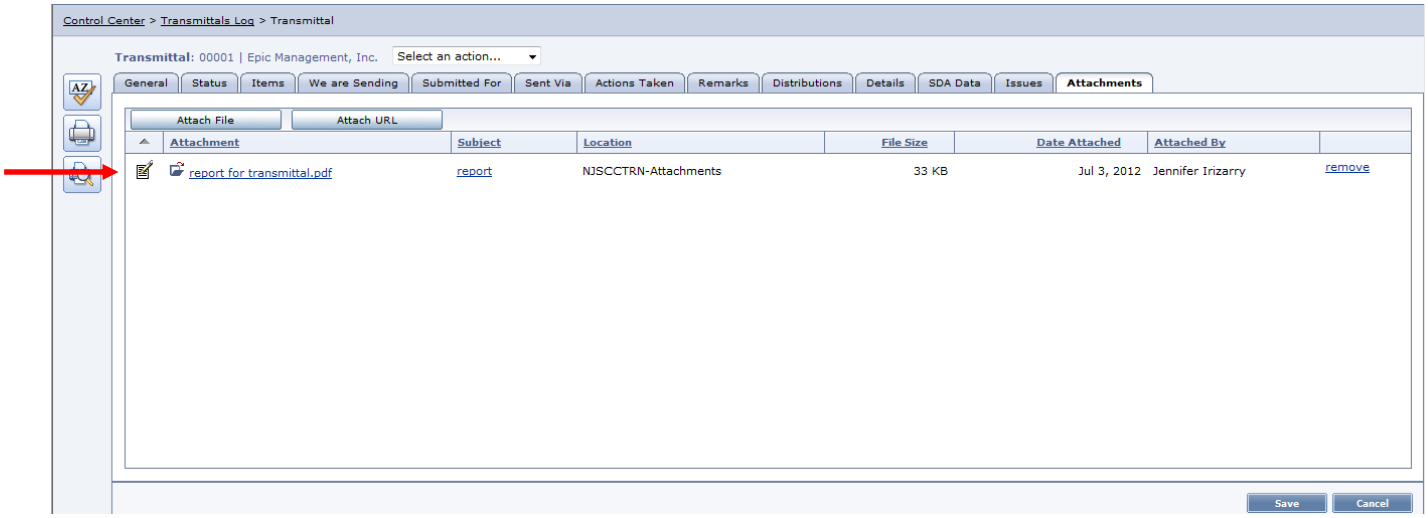
- The **Choose File to Upload** window displays. Navigate to the desired file location, click on the file to highlight it, and click the **Open** button.



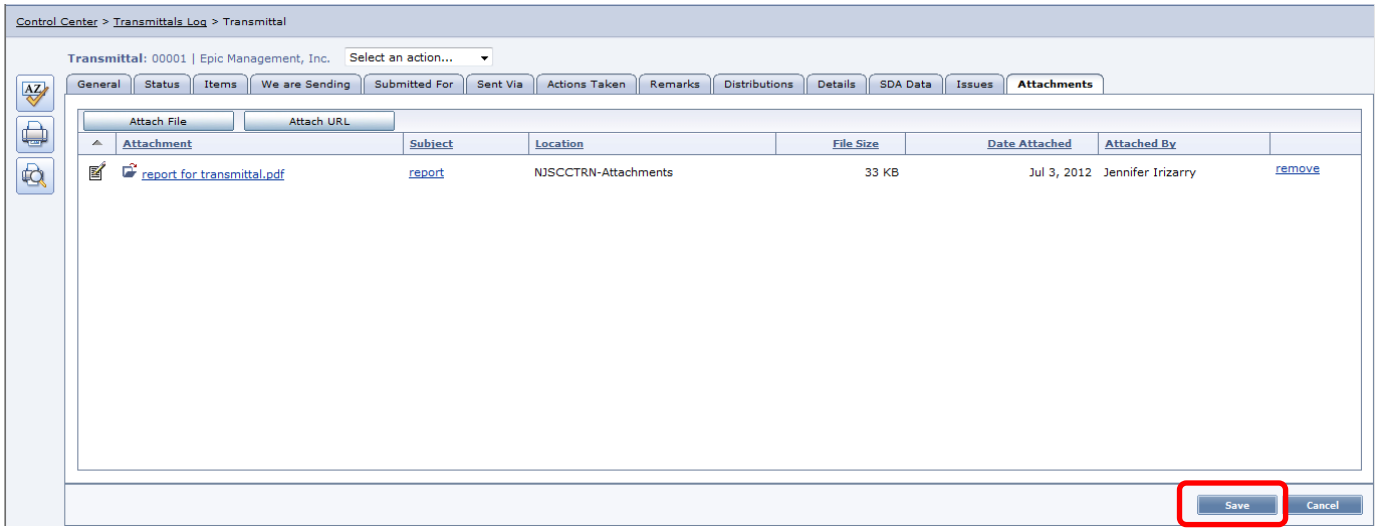
- Enter the subject and/or name of the document in the **Subject** field and click **Save and Close**. You can also choose the **Save & Add Another** button to add additional documents repeating the same process.



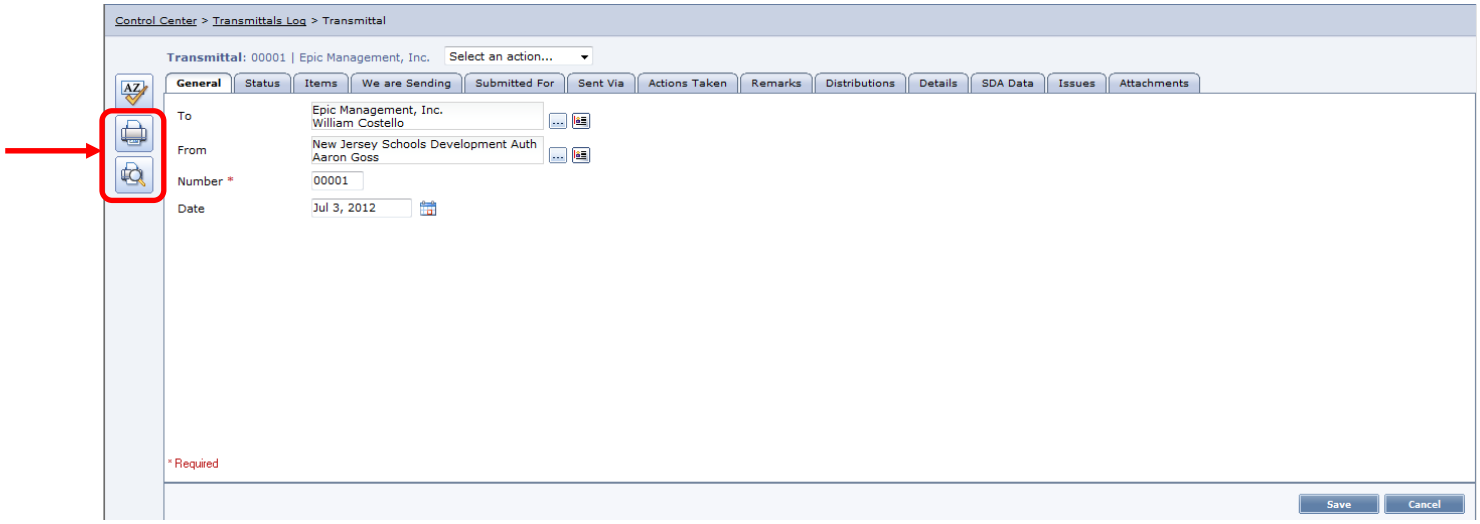
- The attached file displays in the **Attachments** section.



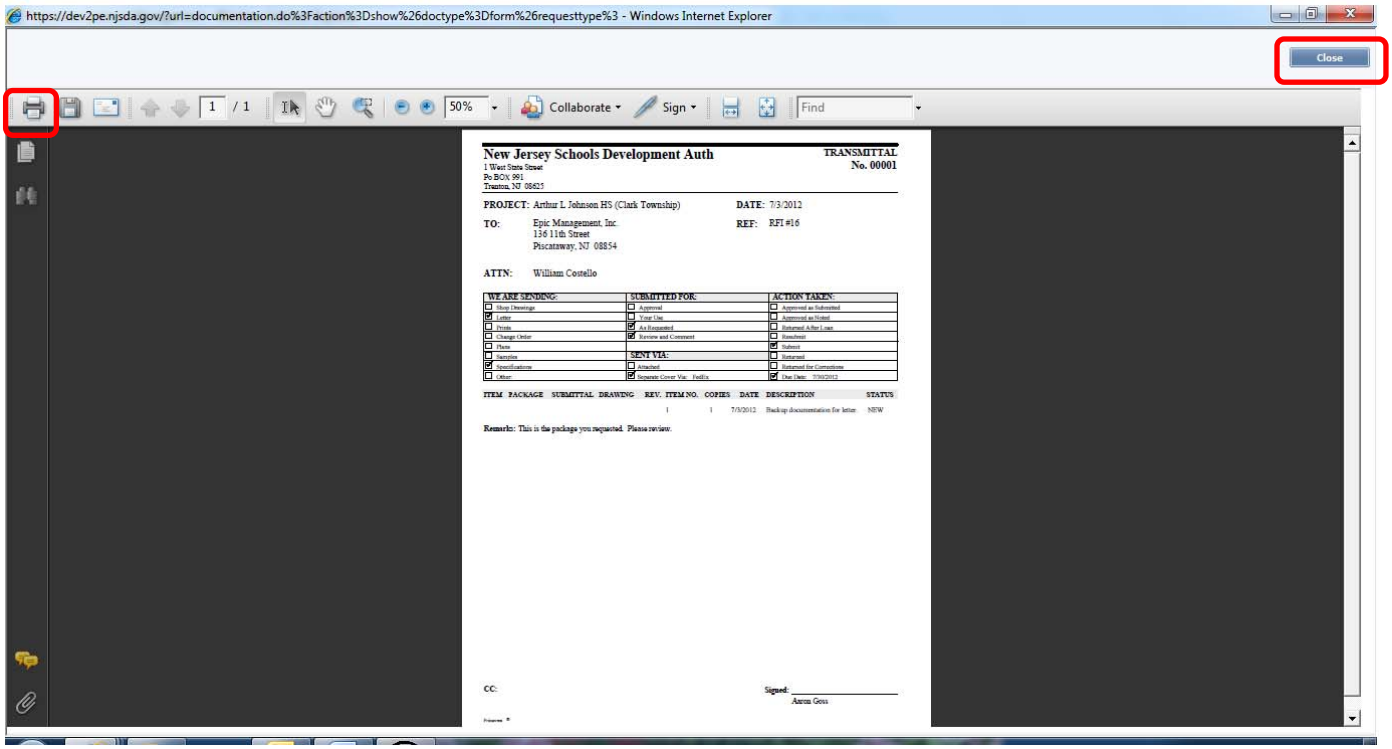
6. When all fields are completed, click the **Save** button at the bottom of the document window.



7. To print the Transmittal, click the **Print Form** button to send the document to a printer, or click the **Print Preview** button to see a preview before printing.



8. An example using the Print Preview button is shown. Click the **printer icon** button to print this report or save it as a PDF. Click the **Close** button to return to the Transmittal document.



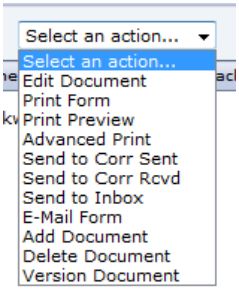
III. Version Document

Contract Management 13.0 provides a Version Document feature to help you maintain multiple versions of your documents and provide a snapshot of the change history of the documents. Versioning a document means it will maintain versions of both the document and any attachments. The document version will be stored as an html file. The attachment version will show information on the location, path and the file size of an attachment, as well as the user who attached the file to the document and the date of attachment.

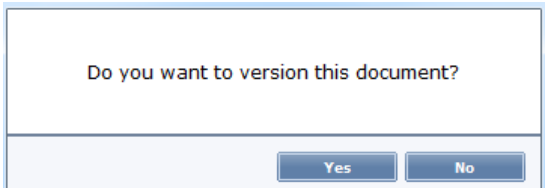
The Versions Tab will be used to track document versions. This tab only displays when you open the document in View mode, not in Edit mode. On the Versions tab, you can view and access previous versions of the selected document, identify who created the versions and when the versions were created.

A. Create a Document Version

1. To create a version of the current document, click the Select an Action menu from the top of the screen and choose Version Document from the drop-down list.



2. Contract Management will prompt you to confirm the Version Document function. Click the Yes button to continue or No to cancel.



3. The Versions tab displays the document version you just created. As new document versions are created, they will be listed on this tab in reverse chronological order. Click the icon to open each version. When the version displays, it will show information available in the document when the version was created.