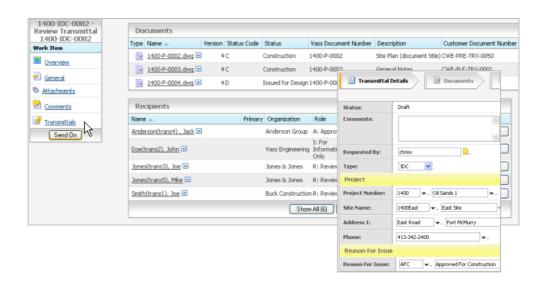# OpenText Transmittals
Collaboration and Control for Capital Project Content

A capital project involves the planning, engineering, procurement, construction and operation of predominantly large-scale buildings, plants, facilities and infrastructure. These projects are complex and regulated, and without proper management they can face spiraling costs to deliver on time and with full compliance.

Many organizations involved in initiating a capital project—the OOs (Owner Operators)—and the companies that do the work—the EPCs (Engineering Procurement Construction) or AECs (Architectural Engineering Construction)—are not well set up to conduct their day-to-day business in a collaborative computing environment. The productivity issues and communication errors faced by these organizations translate into wasted money or added costs that are ultimately borne by the OOs.

Central to the problem is how ideas are shared. A transmittal is used to transfer an asset's drawings, specifications, calculations and other information between the EPCs and OOs, usually for review, comment, or approval purposes. It is also an official business record, forming the basis for many contractual decisions and results, and even determining liability in some situations.

Without a way to control and audit the process of transmittal exchanges, projects can stall and risks can escalate as confusion mounts over who has been sent what version of a document, what has been approved, and how third parties have been involved in the process.

OpenText Transmittals helps standardize and secure a complete and transparent lifecycle for a capital project's transmittals, from creation and review to compliant auditing and retention. The solution's process automation can be optimized for different requirements to maximize productivity and reduce costs, and its integrated search and the addition of user-friendly reporting provide further transparency.

Easily package and distribute information without duplication

The configurable process automation of OpenText Transmittals substantially reduces the risk of errors and delays associated with conventional manual processes. With the solution's Transmittal Wizard, it is easy for a user to create a transmittal, and progress can be saved at any stage for later revision, without sending. Users specify key transmittal information such as the project and reason for issue, associate documents with the transmittal, and select recipients individually or with distribution codes, which allow for pre-configuring roles and delivery methods. Information is never duplicated, as each step of the process is managed by the solution. With flexible, easily selectable methods of delivery—including hard copy and electronic methods such as workflow, email, and secure external collaboration sites—how you interact with partners is in your control.

Transmittal collaboration and lifecycle

Distributing information is only the beginning of the process. OpenText Transmittals captures information about transmittal activity as part of its lifecycle. Once distributed, receipt and responses are managed electronically and securely with the original documents, and transmittals are protected from deletion or editing, providing a permanent record of the transmittal. All of this information is fully auditable to ensure that activity can be traced in the future if needed for conflict resolution.

Secure collaboration with external parties

Parties receiving transmitted data may be external to your organization, and transmittal packages may be too large for email distribution. Adding a secure external site gives partners the ability to collaborate easily over the web. External recipients are notified via email when transmittals are available for pickup. Secure data stored in OpenText Transmittals are available to the individual recipients and their receipt and responses are fully integrated into the transmittal lifecycle.

Feature Summary

Transmittal Lists	Transmittal lists provide a configurable set of transmittals for a particular project or purpose.
Transmittal Creation Wizard	Transmittals are created in 3 steps using a "wizard." Progress can be saved at any stage, without sending, to be revisited at a later date. Transmittal steps include: • **Transmittal Headers:** Transmittal headers are configurable forms that capture key information about a transmittal, such as the sender, project, and reason for issue. • **Transmittal Attachments:** Associating documents with a transmittal is done easily by browsing or using the search templates configured for a transmittal list. Once documents are selected, important attributes from the documents are automatically transferred to the transmittal based on the configuration of the transmittal list. • **Transmittal Recipients**: Transmittal recipients are selected individually or by the use of distribution codes. The use of distribution codes allows for the pre-configuration of the recipients' roles and preferred delivery methods.
Transmittal Cover Sheets	Transmittal cover sheets are easily created in Microsoft Word using automatic data extraction and configured templates. The user can then edit or amend the cover sheet in Word before finalizing it in the solution.
Distribution	Users can receive transmittals via tasks, email, zipped packages, and secure external collaboration sites. Transmittals can also be associated with workflows to extend delivery and processing options
PDF Rendition	All documents in the package can be automatically converted to PDF upon transmittal, or native files can be sent.
Acknowledge and Respond	Transmittals can be acknowledged directly from email notification or from the transmittal wizard. Responses can be recorded for the entire transmittal package or individual documents.

Benefits

- Increases productivity by simplifying and automating the transmittal process

- Improves collaborative capabilities between internal departments and third parties

- Provides configurable processes and flexible delivery mechanisms

- Protects transmittal content with strong records management

- Lowers risk with robust auditing and document-based transmittal histories

- Reduces project cycles by identifying bottlenecks with the addition of user-friendly reporting

- Scalable to support projects across the enterprise

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