

# OpenText Transmittal Management

## 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 Transmittal Management 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 Transmittal Management 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.

### BENEFITS

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- 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

### Transmittal collaboration and lifecycle

Distributing information is only the beginning of the process. OpenText Transmittal Management 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.

### Integrated Managed File Transfer Capabilities

Parties receiving transmitted data may be external to your organization, and transmittal packages may be too large for email distribution. The integration of OpenText Transmittal Management with OpenText Managed File Transfer (MFT) provides fully automated, efficient, and secure delivery of large transmittals to partners and customers. Often times engineering projects take place in remote or geographically disparate locations with project participants located around the world. Managed File Transfer helps ensure that the right information gets to the right people regardless of challenges in network conditions. This way, Document Control Managers and project participants don't have to manage these file transfers manually and can be sure files will be delivered in an efficient and secure way. ■

## FEATURE SUMMARY

<b>TRANSMITTAL LISTS</b>	Transmittal lists provide a configurable set of transmittals for a particular project or purpose.
<b>TRANSMITTAL CREATION WIZARD</b>	<p>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:</p> <ul style="list-style-type: none"> <li>■ <b>Transmittal Headers:</b> Transmittal headers are configurable forms that capture key information about a transmittal, such as the sender, project, and reason for issue.</li> <li>■ <b>Transmittal Attachments:</b> 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.</li> <li>■ <b>Transmittal Recipients:</b> 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.</li> </ul>
<b>TRANSMITTAL COVER SHEETS</b>	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.
<b>DISTRIBUTION</b>	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
<b>PDF RENDITION</b>	All documents in the package can be automatically converted to PDF upon transmittal, or native files can be sent.
<b>ACKNOWLEDGE AND RESPOND</b>	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.

## INTEGRATED MANAGED FILE TRANSFER CAPABILITIES

<b>STREAMLINED AUTOMATION</b>	Fully automated, efficient, and secure delivery of any size transmittal package from the Transmittal Management wizard interface.
<b>ULTRA-FAST TRANSMITTAL DELIVERY OF LARGE VOLUMES OF INFORMATION</b>	Based on patent-pending file acceleration technology, which can send files up to 30 times faster than traditional methods such as FTP. Ideal for organizations sending large volumes of information between remote project sites, or offshore platforms.
<b>SECURITY AND RELIABILITY</b>	Encryption of content-in-transit to protect customer information, and time limits on availability of information. Transmittal file delivery with auto-resume, QoS support and network conditions adaptability.
<b>INTUITIVE USER EXPERIENCE</b>	The sender simply selects MFT as the delivery option and the recipient(s) receive an email with a download link. When the recipient clicks on the link, MFT ensures that the files are quickly and securely delivered to the user's workstation.

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