

Power & Water Customer Collaboration Documentum:

Working with Transmittal Forms



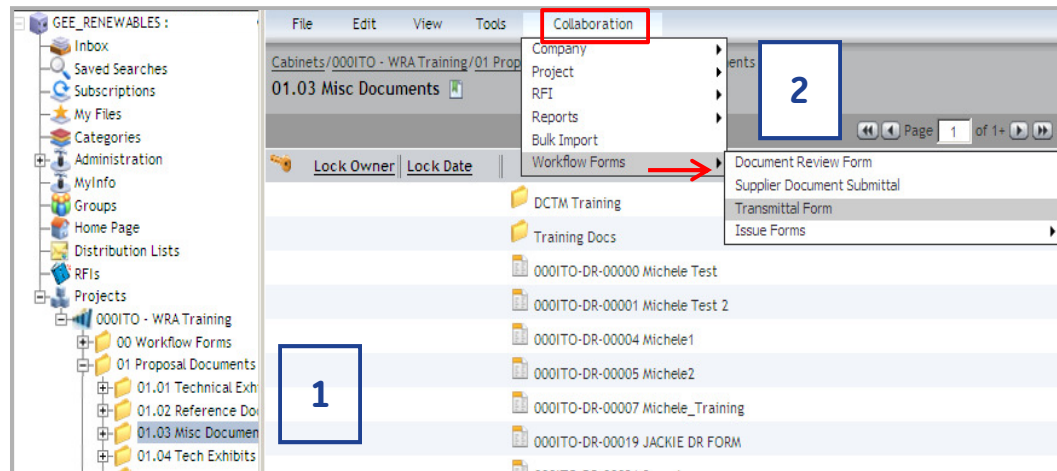
imagination at work

Module Objectives:

1. Create a Transmittal Form
2. Transmittal Form Email Notification
3. View a Transmittal form

Create a Transmittal Form

A Transmittal Form is used to submit documents/information and does not require any response from the recipient(s). It serves as a record of transmission only.



1. Select the folder from the Navigation Tree where the Transmittal Form should reside.

2. Choose "Collaboration", "Workflow Forms" and "Transmittal Form".

Create a Transmittal Form

Edit Form : Untitled-09abb1298002a5d3

Document Transmittal Form

IPS Number: 000ITO	Transmittal Number:
Project Name: WRA Training	Submitted By:
* Transmitting Company: <input type="text"/>	Reference Number: <input type="text"/>
* Name/Subject: <input type="text" value="Untitled-09abb1298002a5d3"/>	Discipline: <input type="text"/>
Issue Type: <input type="text"/>	Gen Serial Number: <input type="text"/>
Comments Due Date: <input type="text" value="Date"/>	GT DM Number: <input type="text"/>
Issue Due Date: <input type="text" value="Date"/>	ST Serial Number: <input type="text"/>
Sins Number: <input type="text"/>	Memo of Shipment Number: <input type="text"/>

Complete all fields as required in Documentum (red asterisk) and as needed for the business process.

*Name/Subject field: Documentum will generate an arbitrary number unless the user inputs their own name/subject choice.

Create a Transmittal Form

The screenshot shows the 'Document Transmittal Form' interface. The form includes fields for: IPS Number (000ExTHUS), Project Name (Training Project), Transmittal Number, Submitted By, Transmitting Company (GE Energy - Americas), Name/Subject (Test Issue Due Date), Issue Type, Issue Due Date (Date), Reference Number, Discipline, Gen Serial Number, GT DM Number, ST Serial Number, Sins Number, and Memo of Shipment Number. Two callout boxes provide instructions: one points to the MLI/MDL Number list, stating 'New codes added will then be placed in list as a choice for future forms', and another points to the empty input box below it, stating 'Select and add the appropriate "MLI/MDL" number or create /add a new code by inserting it in the box directly below.' A third callout box points to the Distribution List, stating 'Select the distribution recipient(s). *See Below'. The Distribution List contains several entries, including '000exthus_2.2.concerns' and '000EXTHUS_MicheleTest08162011'.

***Customized project Distribution Lists previously created will appear in the "Distribution List" box as a routing choice. The form will be sent to all users in the list. You may also choose individuals in addition to the Distribution List.**

Create a Transmittal Form

Target Groups: CUSTOMER, CUSTOMER AE, GE, INTERNAL, MICHELE1

(add other option)

Note: Target Group is not related to Distribution List. It is an additional searchable attribute for the transmittal form.

Attachments: Add/Remove

Name	Title	Modified	Document Status Code	Revision Level
none selected				

Comments:

Transmit Documents Save As Draft Close

Choosing a Target Group allows for more refined searching and reporting capability.

Select the Target Group(s) (optional).
 *Create/add a new group by inserting it in the box directly below. New groups added will then be placed in list as a choice for future forms.

Add attachments and comments as needed.
 *Files attached must reside in the project where the form is created.

Choose an item:

Starts with: Show All

Name	Modified
000ITO-DS-00001 SSF 1	1/6/2011 10:45 AM
000ITO-DS-00004 SSF-09abb12980014667	1/24/2011 3:26 PM
000ITO-DS-00005 SSF-09abb1298001466a	1/24/2011 4:05 PM
000ITO-DT-00001 Test 111	1/6/2011 10:57 AM
000ITO-DT-00002 ABC	1/6/2011 11:48 AM
01242011_Test Doc 1-Michele.doc	1/24/2011 3:58 PM
01242011_Test Doc 2-Michele.doc	1/24/2011 3:58 PM
02012011_Documentum Test Doc 1-Michele.xls	2/1/2011 8:16 AM
02012011_Documentum Test Doc 2-Michele.xls	2/1/2011 8:24 AM
02012011_Documentum Test Doc 3-Michele.xls	2/1/2011 8:16 AM
02012011_Documentum Test Doc 4-Michele.xls	2/1/2011 8:16 AM
02032011Documentum Test Doc 1-Michele.xls	2/3/2011 2:20 PM
09abb1298000f488	1/6/2011 11:52 AM
ABC2.doc	1/6/2011 10:26 AM
ABC3.doc	1/6/2011 10:26 AM
ABC3.doc	1/6/2011 11:30 AM
Check Out File	2/4/2011 10:56 AM

Items per page: 50


Click "OK" to complete action.

OK Cancel

Highlight chosen file(s) and click button to add or remove

Click "OK" to complete action.

Create a Transmittal Form

Name	Title	Modified	Document Status Code	Revision Level
<input type="checkbox"/>  A Train Test Doc-JR.txt	Train	4/20/2011 9:06:31 AM		

Comments: Add Comments as Needed.

Enter Comments (Max 2000 Chars)

Transmit Documents **Save As Draft** **Close**

Transmit Documents – Send the form and return to the project workspace.

Save As Draft - Complete at another time - drafts will be located in the folder where the form was created or under “00 Workflow Forms” (expand folder and choose “Document Transmittal Forms” to locate the form).

*To modify/complete the form, select it, right click and choose "Prepare to Retransmit". Make the changes as needed and then submit. You may also continue to choose “Save as Draft” and submit at a later time.

Close - Cancel the form.

Transmittal Email Notification

Notification of Document Transmittal - Message (HTML)

From: [Redacted] Sent: Mon 2/7/2011 5:22 PM

To: [Redacted]

Cc: [Redacted]

Subject: Notification of Document Transmittal

Project: WPA Training

Transmittal Number: 000ITO-DT-00008

Name/Subject: Test Transmittal

Transmitted by:

Transmittal date: Mon Feb 07 17:21:46 EST 2011

Comments:

Time Stamp	Comments By	Comments
07 Feb 2011 05:21:32 EST		User can add any necessary comments.

Attachments:

File Name	Title	Revision Level	Folder Path	URL
02012011_Documentum Test Doc 1-Michele.xls	Training Session - 02/01/11		01.03 Misc Documents	Click Here
02012011_Documentum Test Doc 3-Michele.xls	Training Session - 02/01/11		01.03 Misc Documents	Click Here
02012011_Documentum Test Doc 2-Michele.xls	Training Session - 02/01/11		01.03 Misc Documents	Click Here

To access the Transmittal Form in the Collaboration tool and view all details, please follow these steps:

1. Click the URL: <http://collaborationspace.oe-energy.com/woollab/component/drt?objectId=09abb12980016fb5>
2. Enter the SSO ID / Pwd
3. Select P&L Segment: **RENEWABLES**

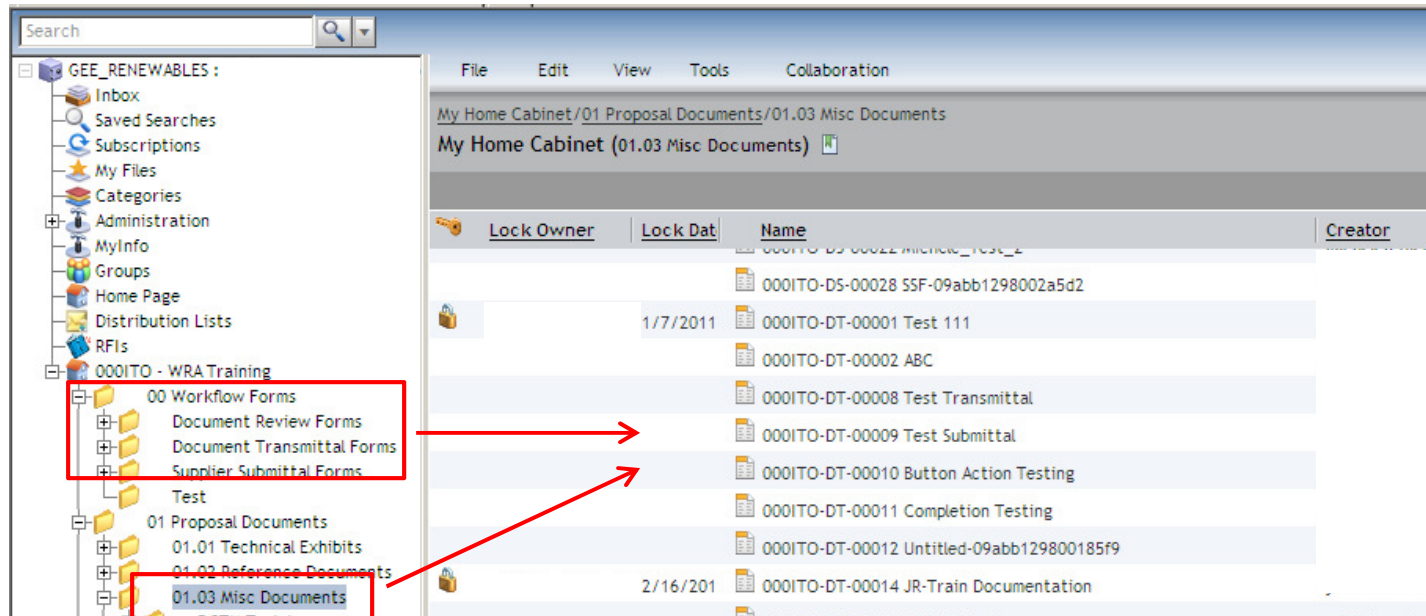
An Outlook email notification will be sent to the Transmittal recipients. From this email, the user will be able to view the attachments (when link clicked, screen below will appear-choose "View") and access the form for action through the link provided.

Open : 050311_Test Doc 4-Michele.doc

Version : 3.0, CURRENT
Format : MS Word Document 8.0-2003 (Windows)

View Edit Annotate

View a Transmittal Form



Navigate to the project where the form was created. Select the folder where the form resides or, expand the “00 Workflow Forms” folder and choose “Document Transmittal Forms” to locate the form.

Double click on the form in the workspace area to open/view.

You may also open the form from the Outlook email notification by clicking the link listed.