Out-Processing a Transmittal

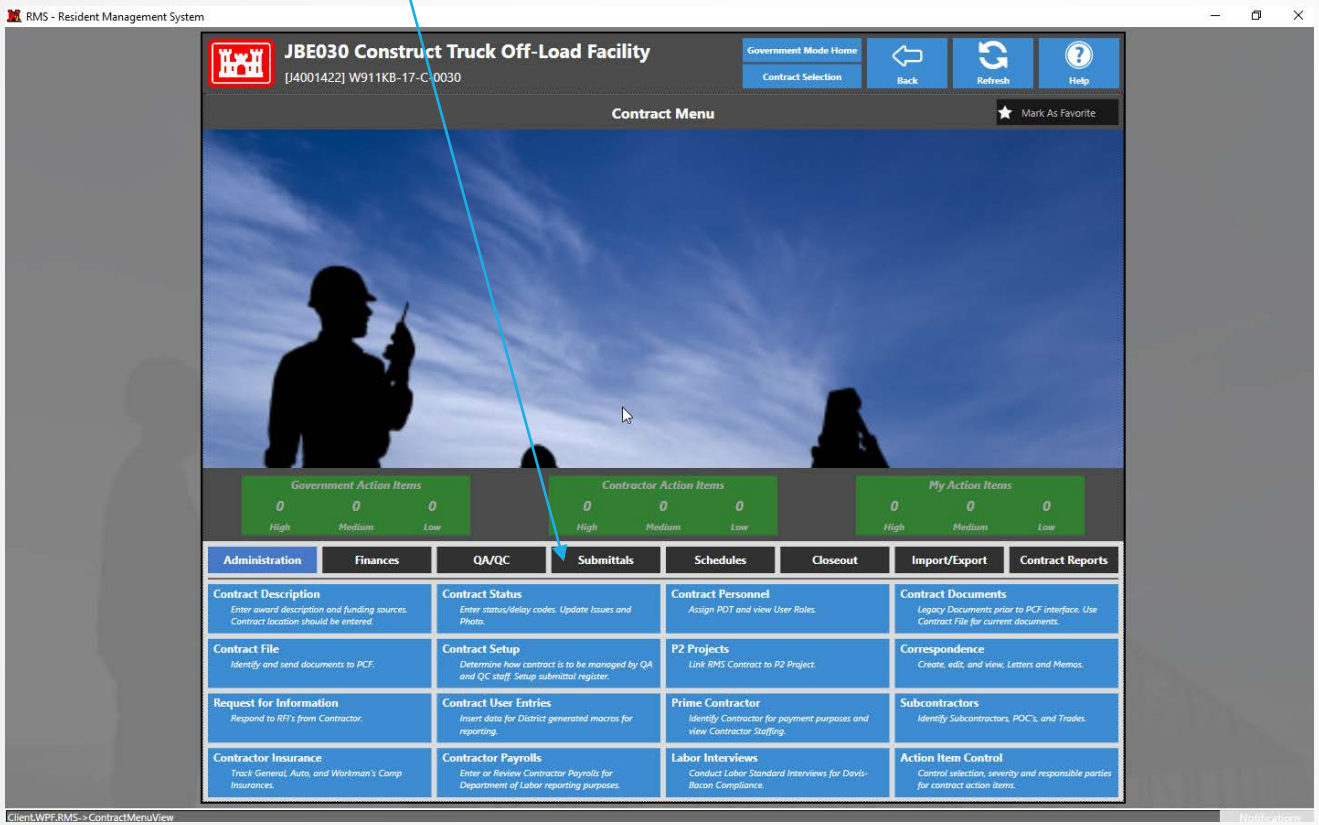
RMS 3.0 Government Mode

The following slides are how to out-process transmittals in RMS 3.0. These slides will be changing as the transmittal module will be revised in the near future.

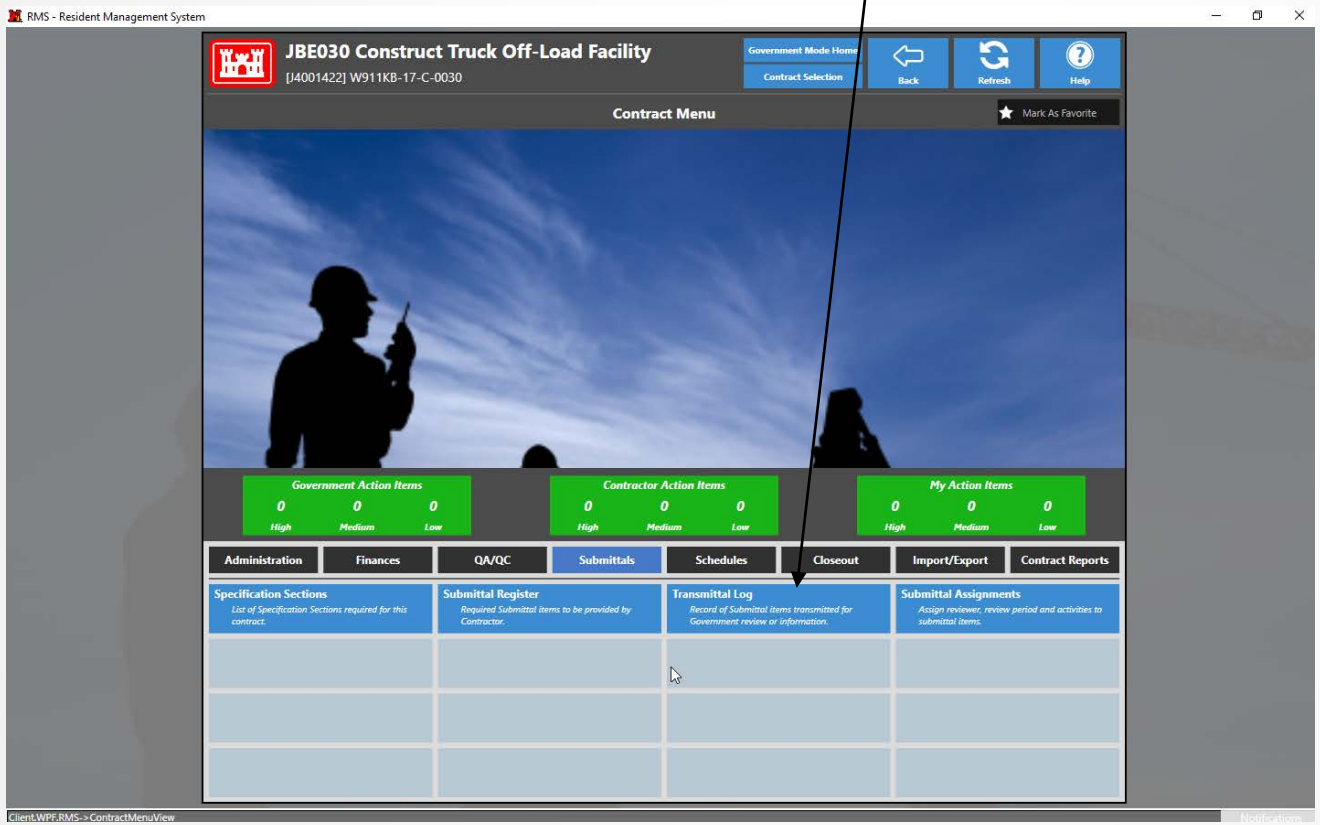
The following slides only covers the process from the time the primary reviewer has completed their review and, if necessary, consolidated all secondary reviewer comments.

According to District/Office policy, the primary reviewer should inform the appropriate PDT team member that the review is completed.

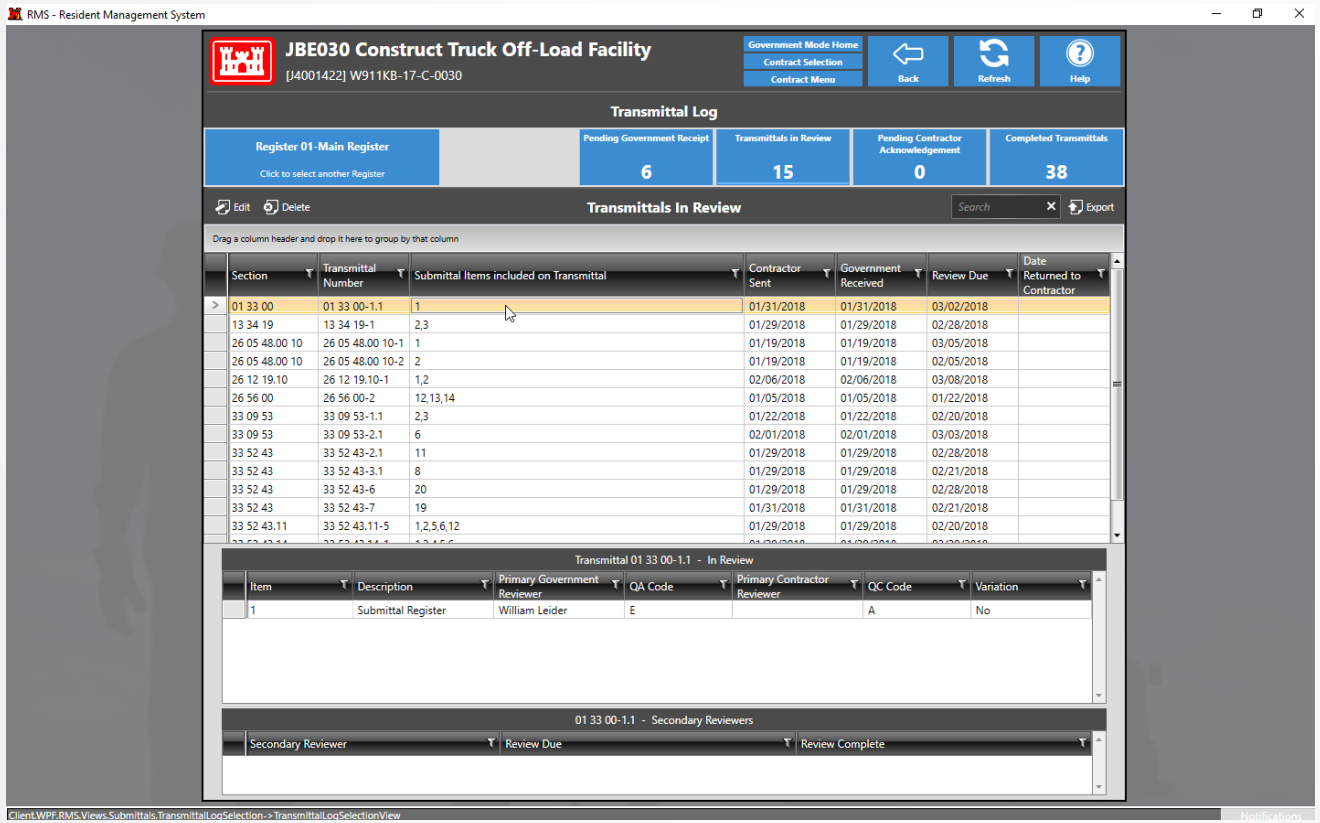
From the main “Contract Menu” select “Submittals”.



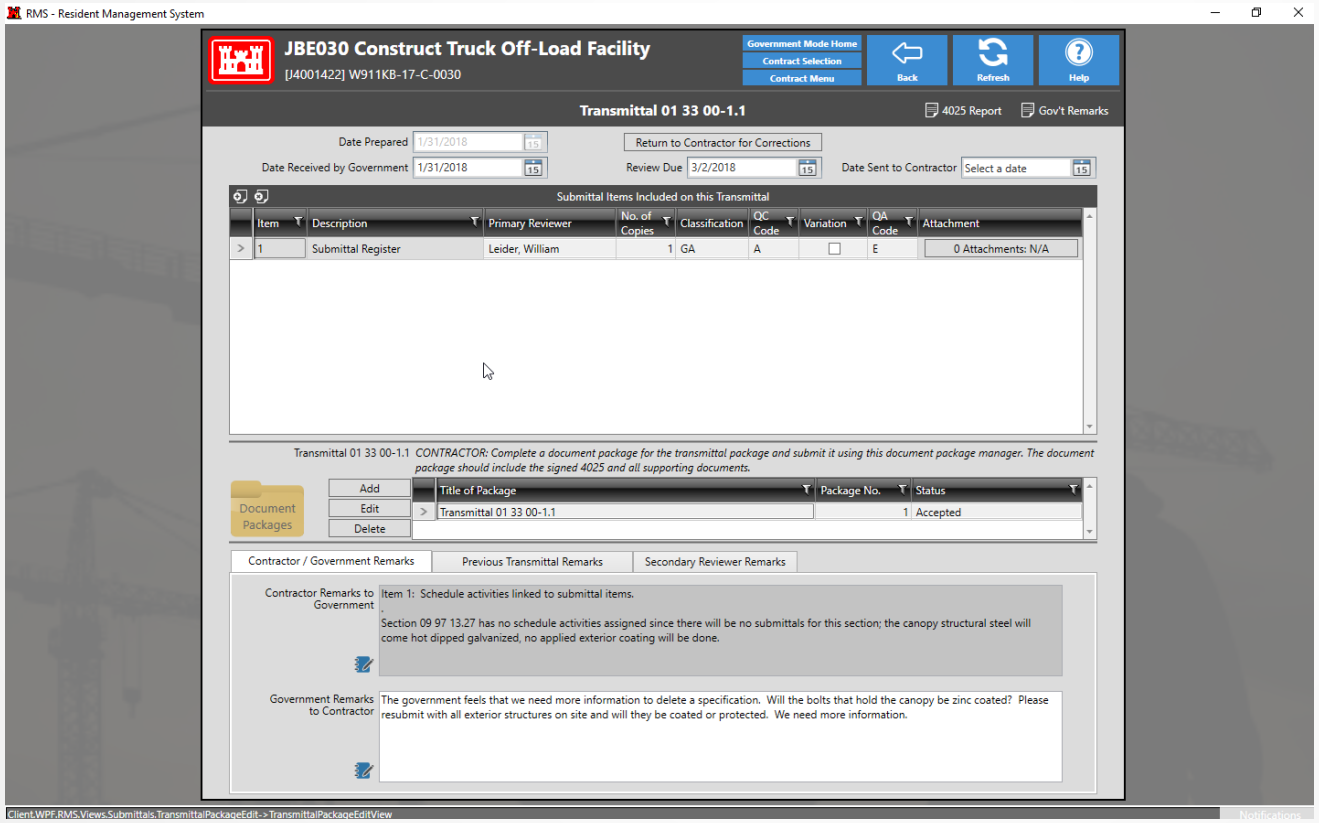
From the “Submittals” main screen, select “Transmittal Log”.



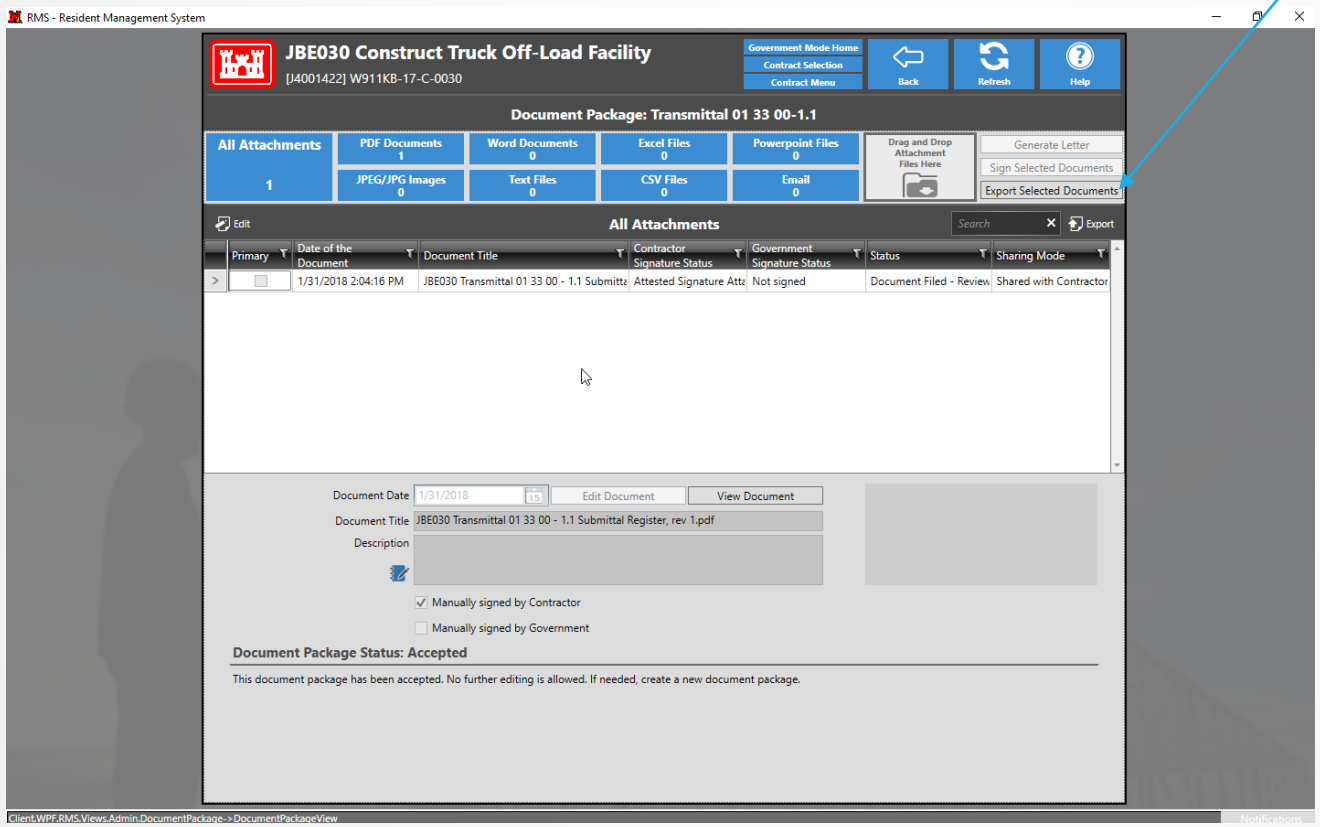
The “Transmittal Log” screen will default to “Transmittals in Review”. Highlight the transmittal being prepped for out-processing/signature. Either double click or select “Edit” to open the transmittal.



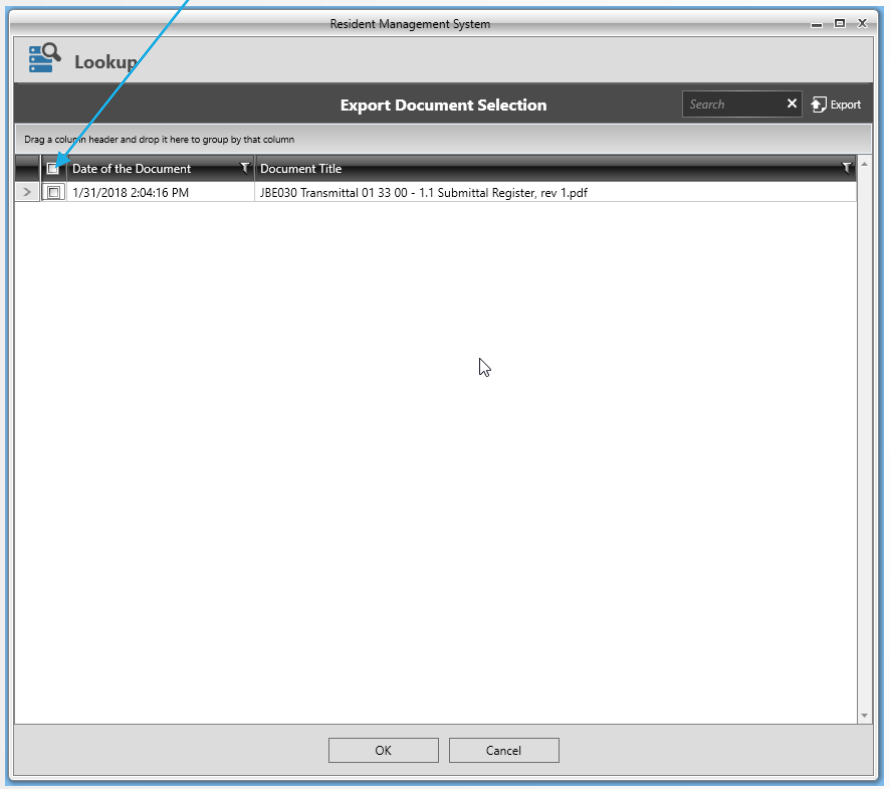
Under the Transmittal screen highlight the Contractor's "Document Package" and either double click or select "Edit".

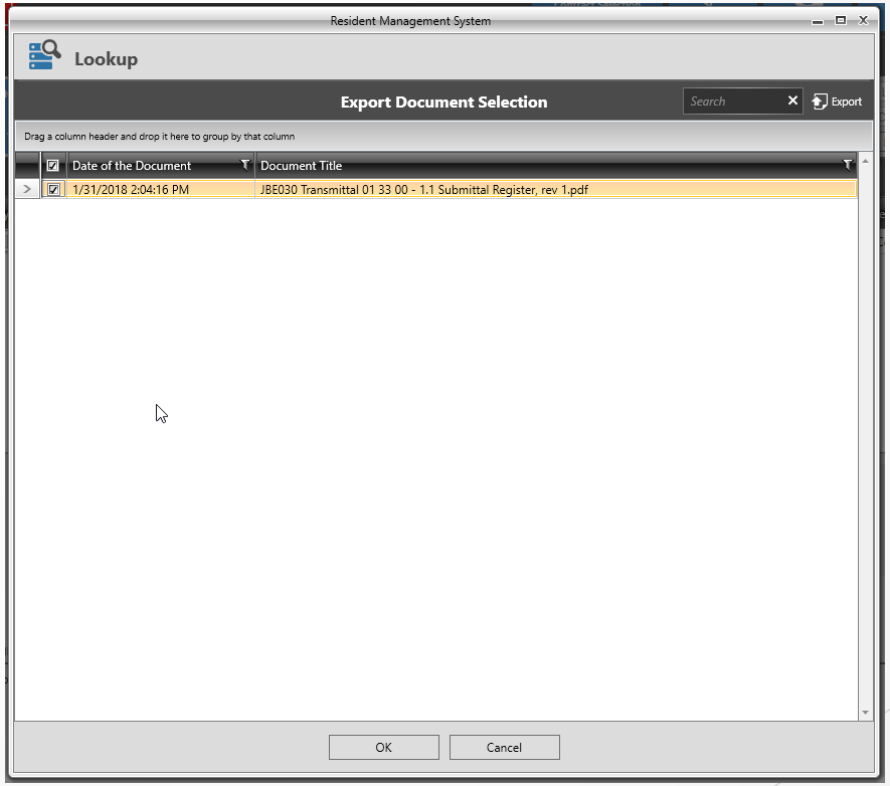


Click on “Export Selected Documents”.

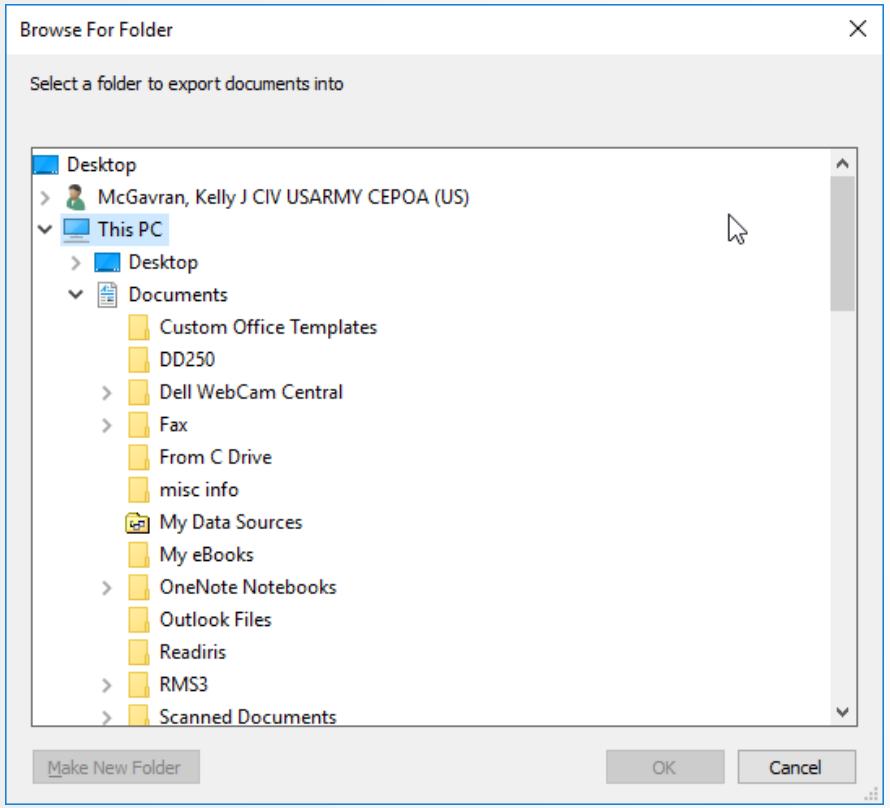


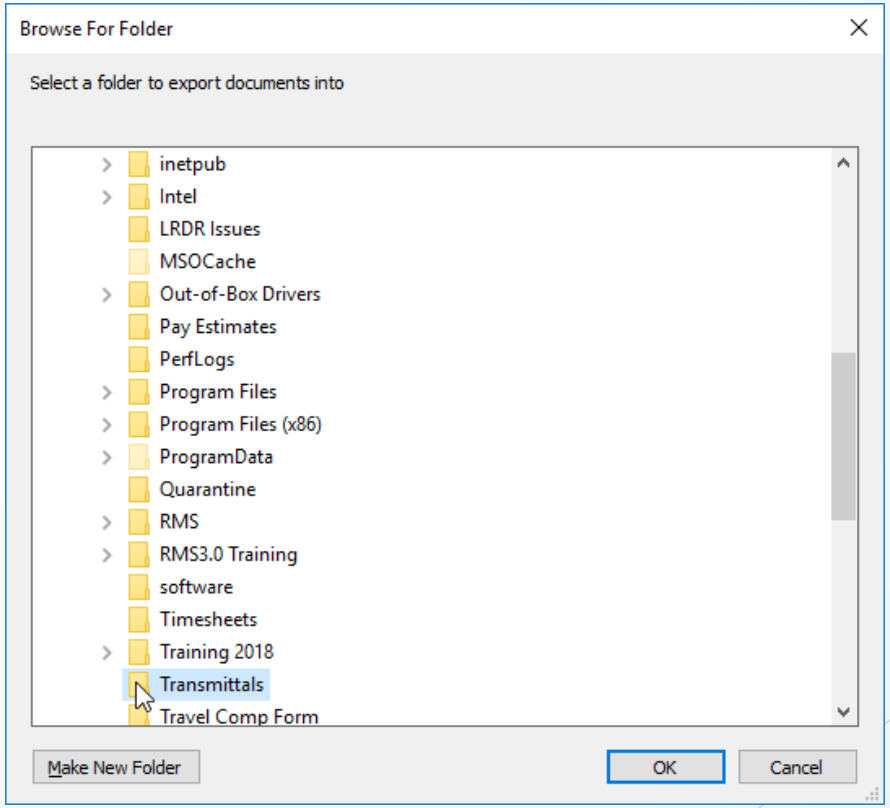
Under “Export Document Selection”, select all documents by checking the white box in the upper left hand corner next to “Date of the Document”. This will mark all documents for exporting. Click “OK”.



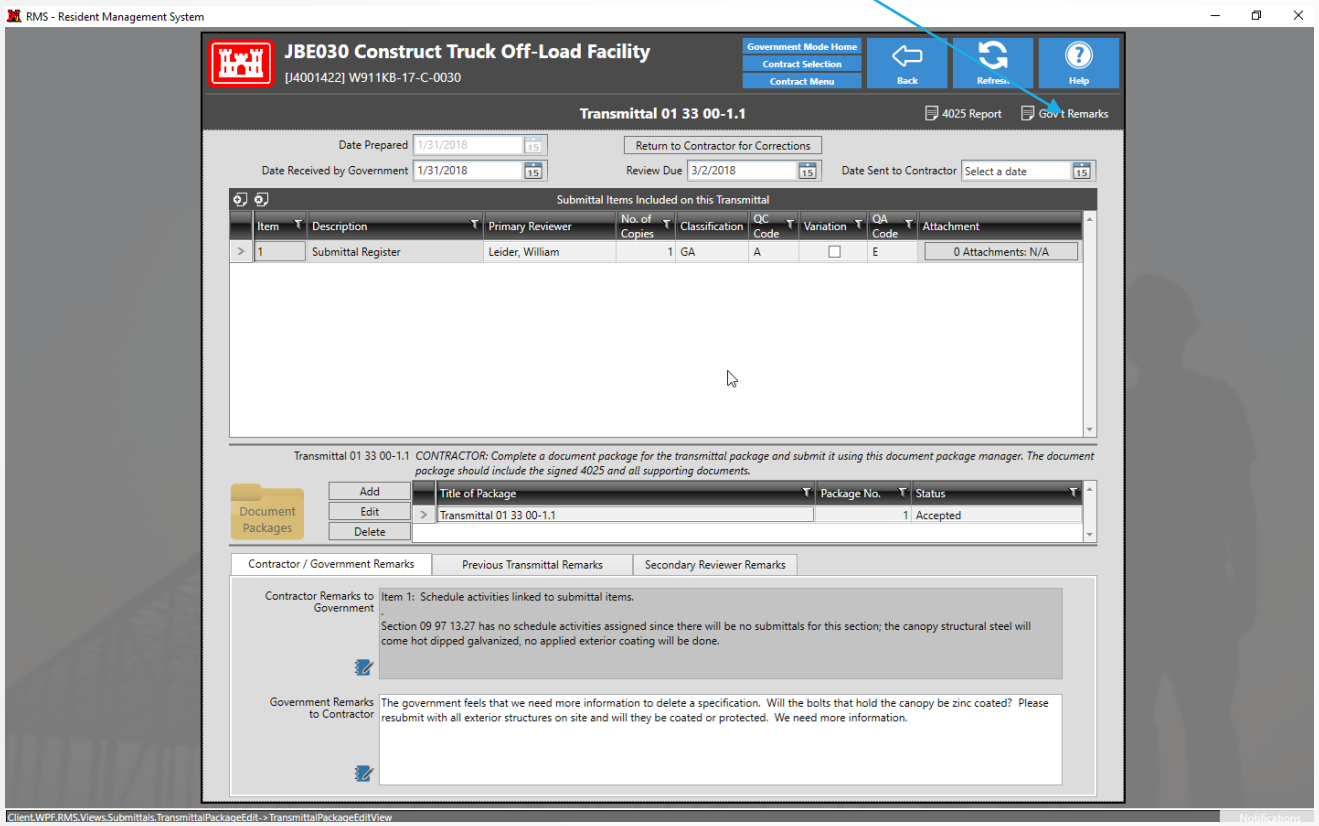


Map the files that are being exported to a working file outside of RMS. Select “OK”. Click the back arrow.

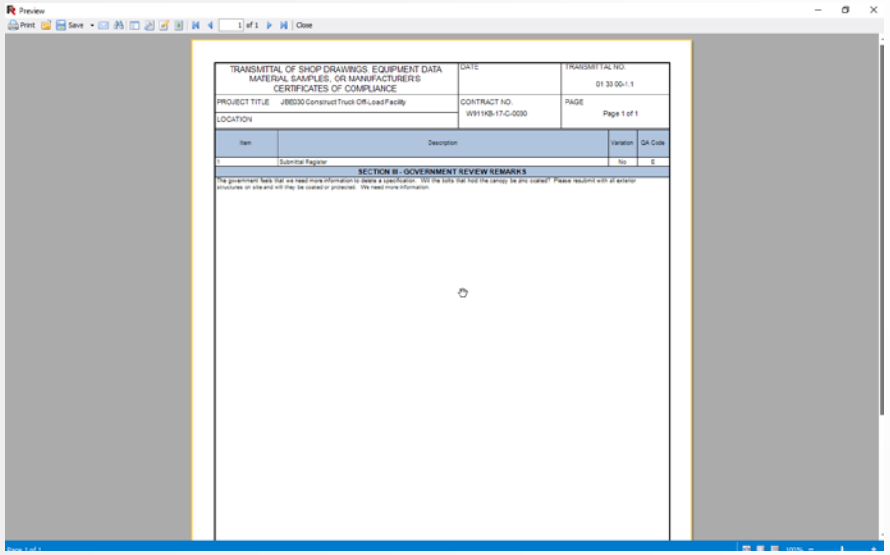


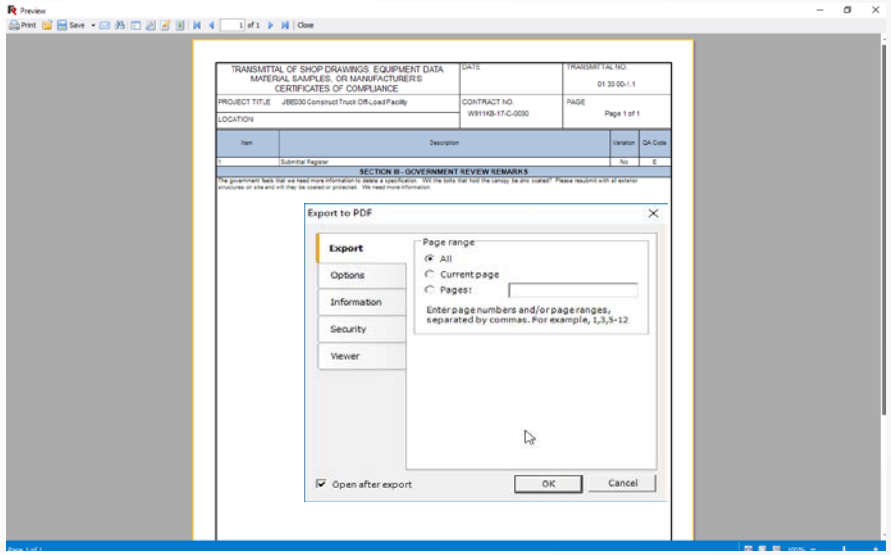


From the Transmittal screen, click on “Gov’t Remarks” if necessary.

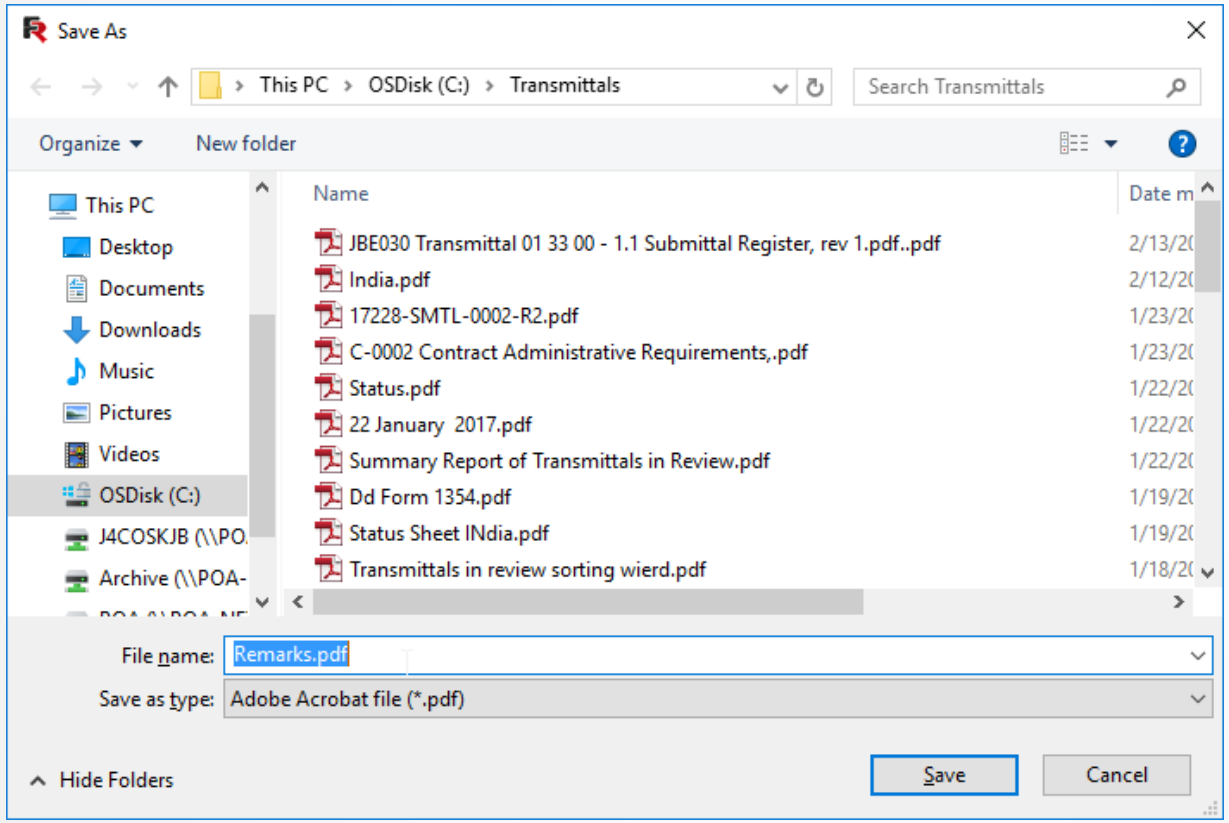


Click “Save”. Use the default that appears and click “OK”.

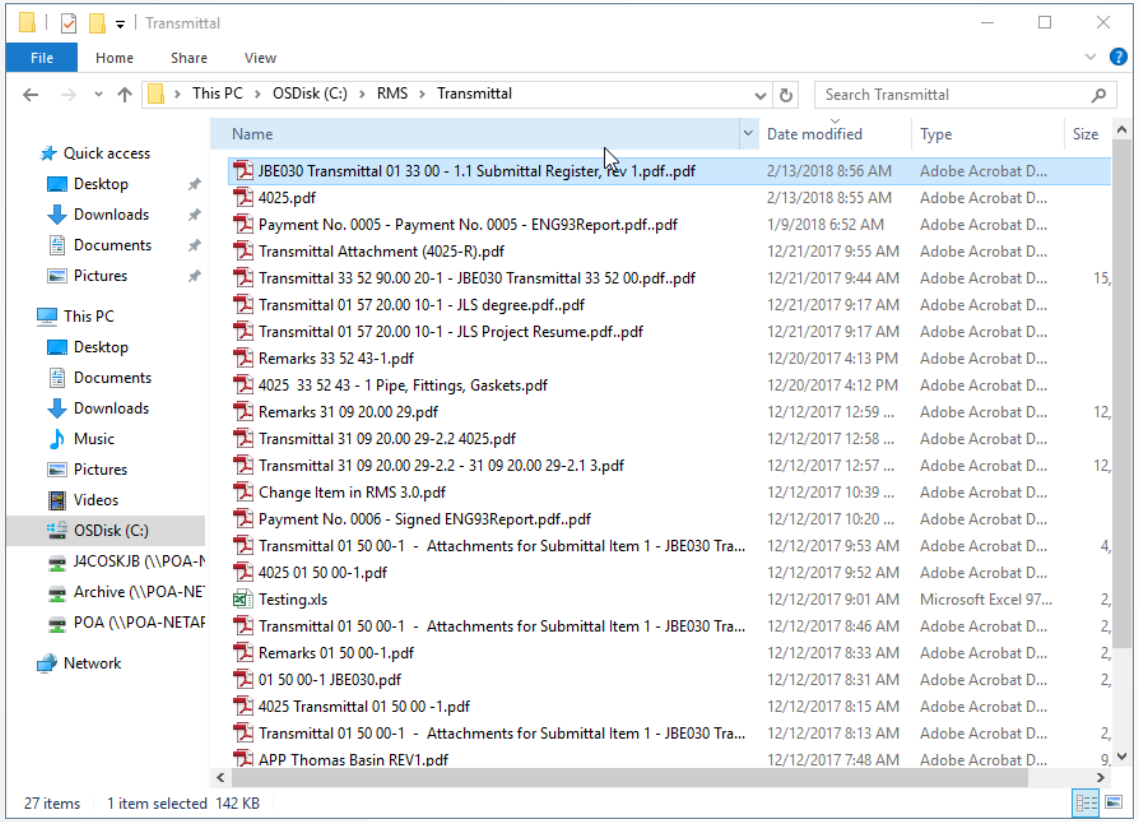




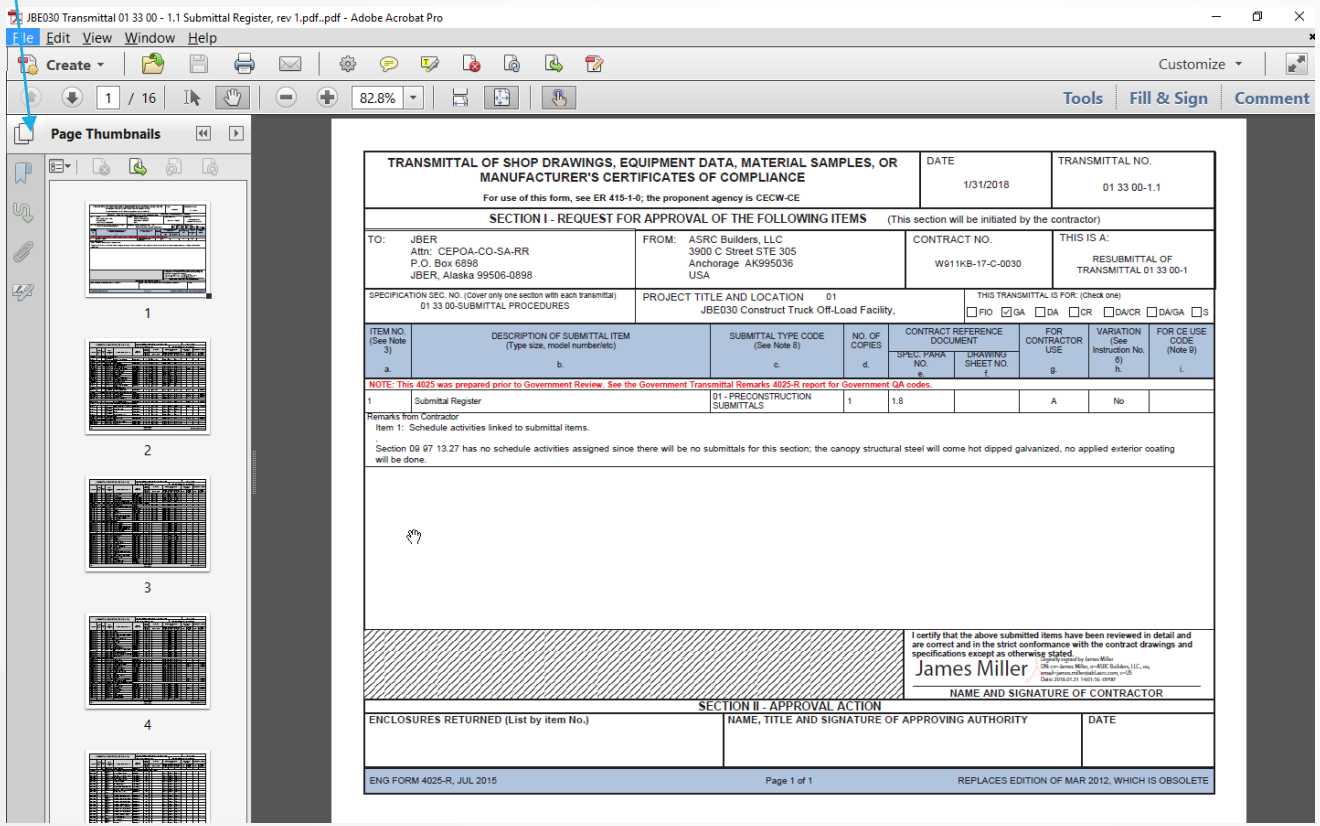
RMS remembers the last place that it was mapped to save to. Name the file and click “Save”. A separate PDF file will open, close out of this. It will be used later.



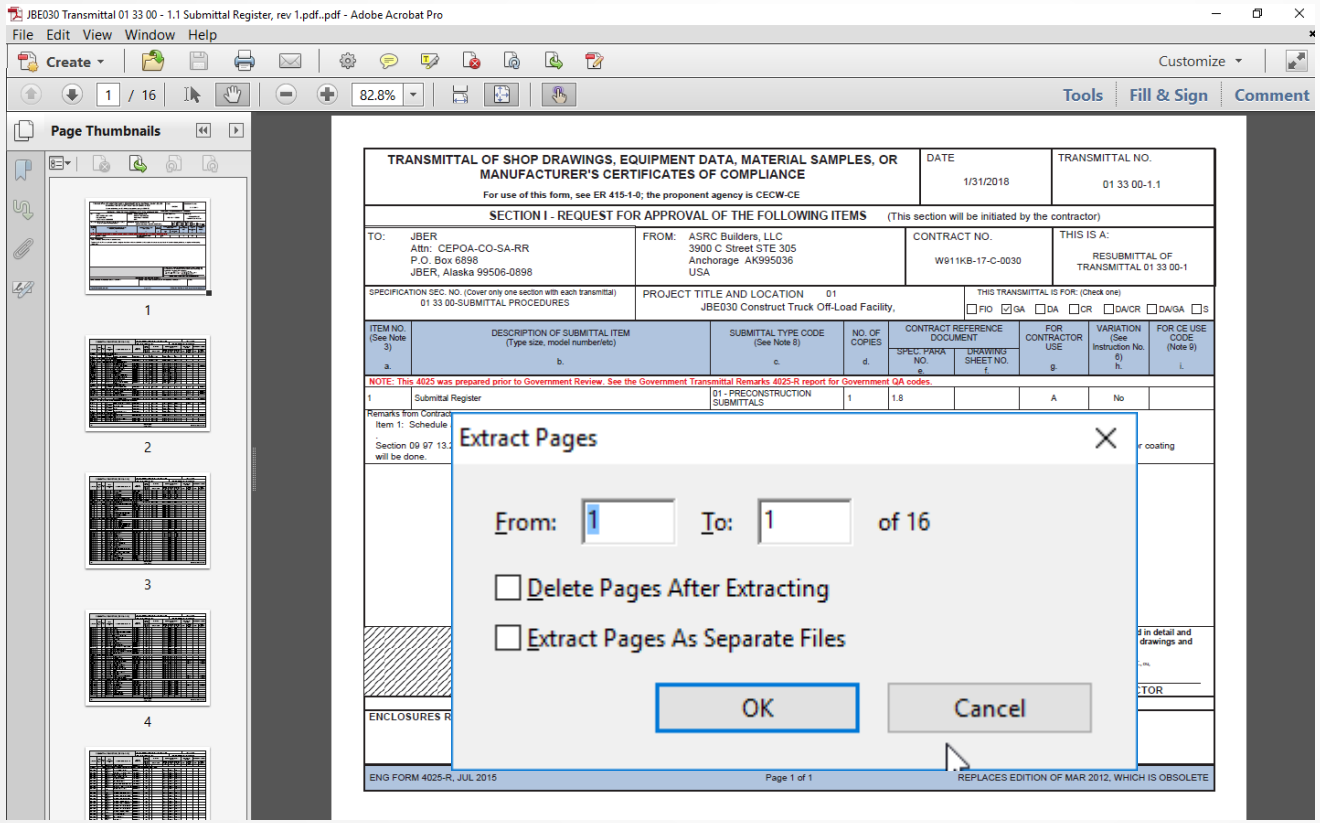
Open the working file outside of RMS.



Note: The majority of the contractor's documents will be in Adobe Acrobat. The 4025 might have already been a separate file, if not do the following.
Open the working file and click on "Page Thumbnails" to bring up the list of pages.

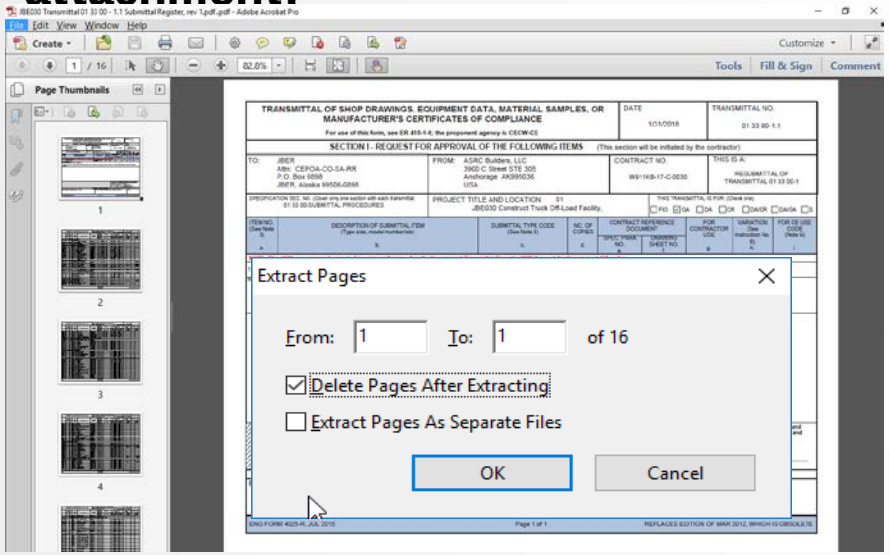


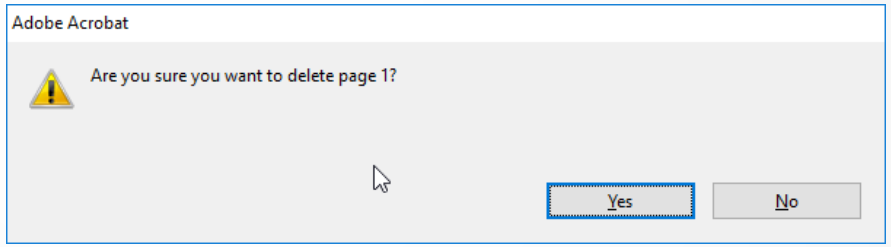
Highlight the 4025 in the “Page Thumbnails”. Right click and select “Extract Pages”.



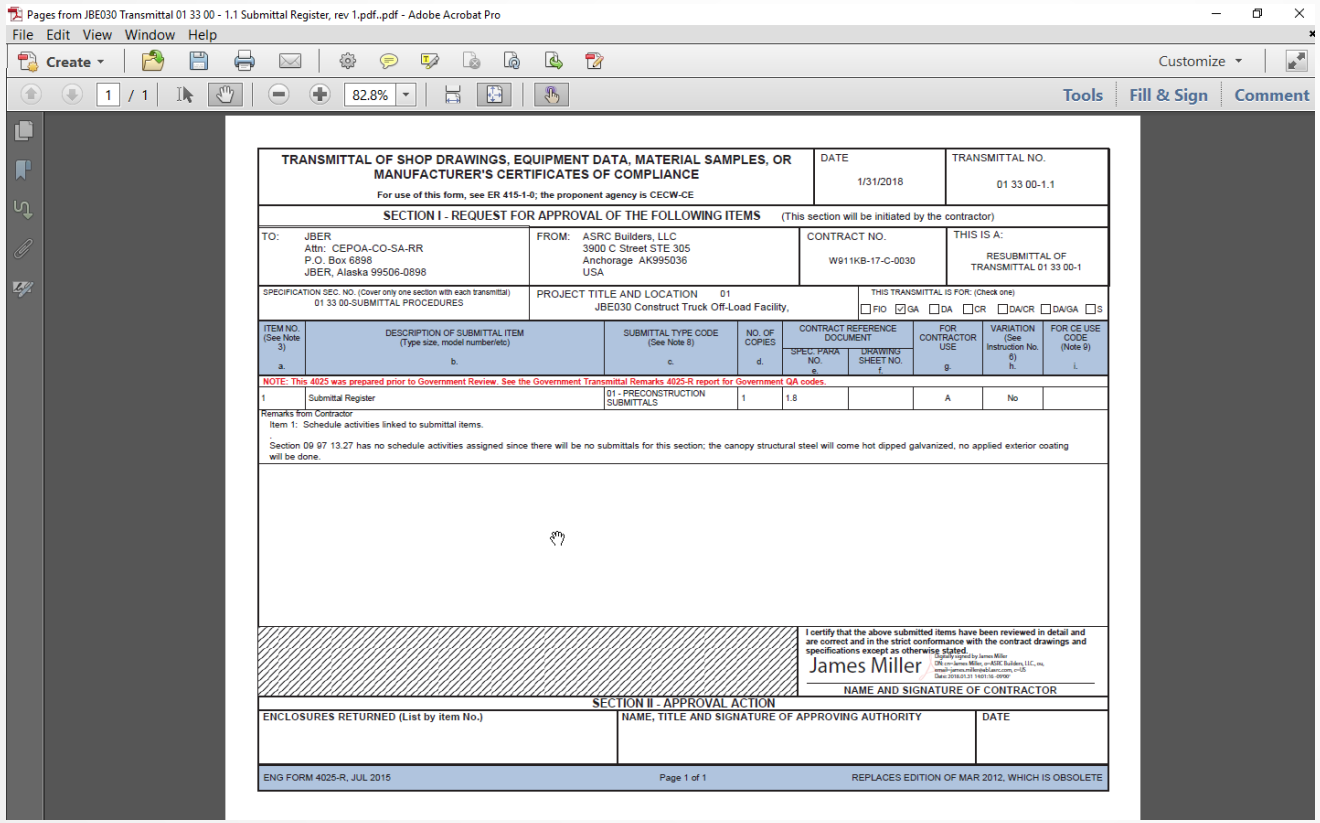
Select “Delete Pages After Extracting” and click “OK”. Select “Yes” when prompted.
Note: This will remove the 4025 from the contractor’s document package and will allow the 4025 to be dragged and dropped back into RMS as a separate attachment.

IMPORTANT: **To sign electronically in RMS, the 4025 shall be its own attachment.**

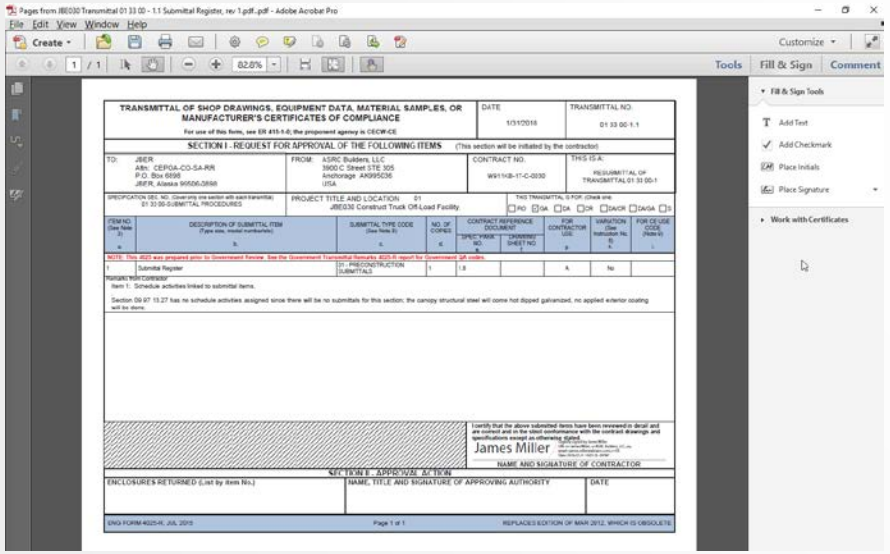


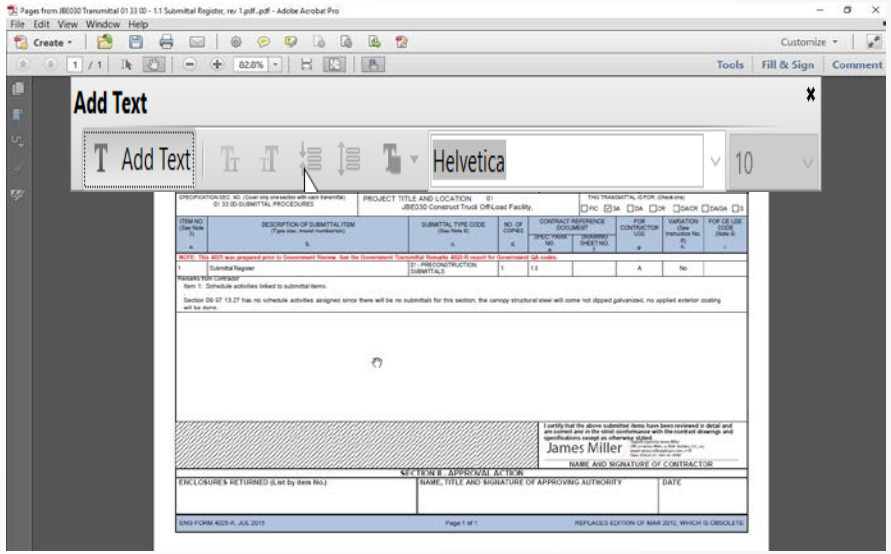


The 4025 will open in a separate screen and is ready for coding.

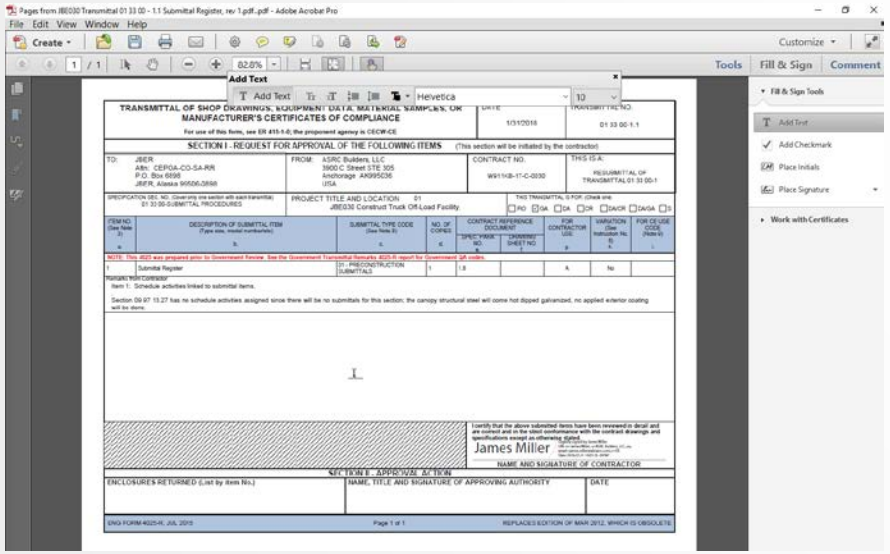


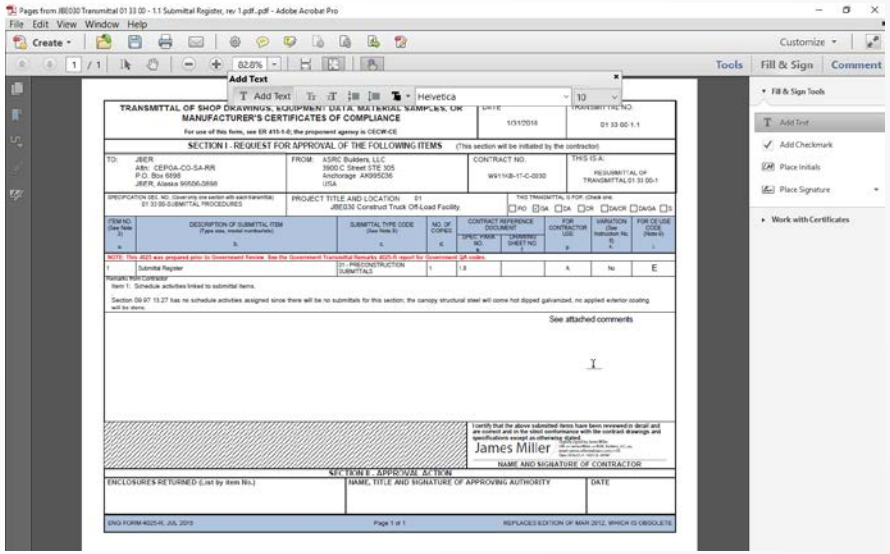
Under “Fill & Sign” select “Add Text”. An “Add Text” box will appear.



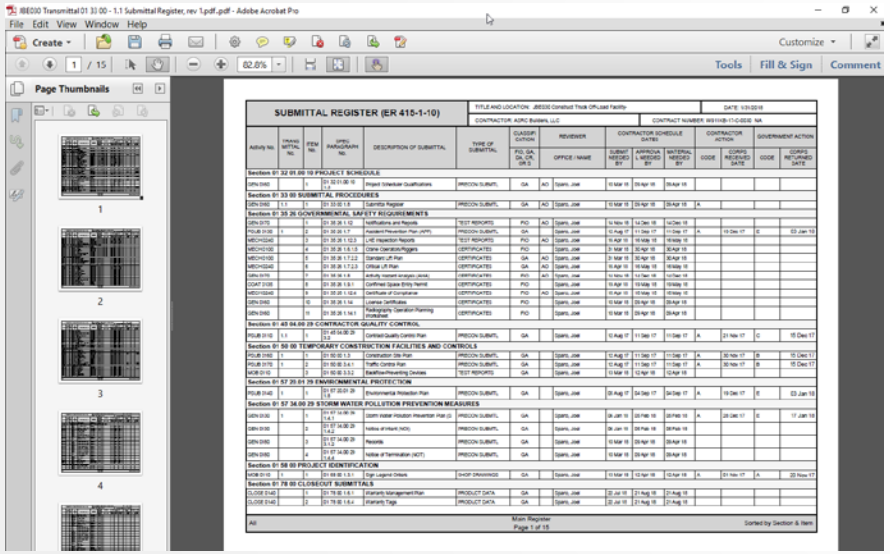


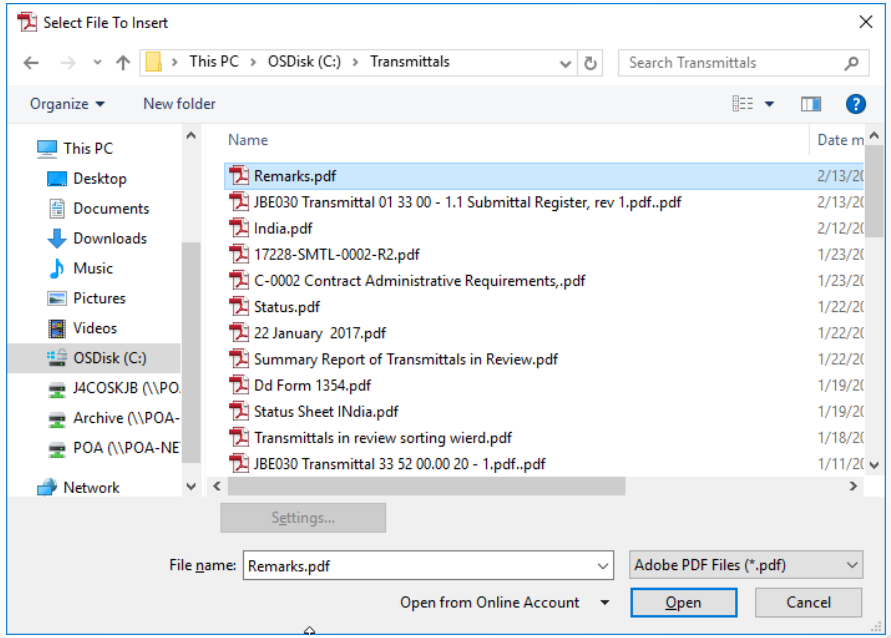
Click in the white box under “i” for the text cursor to appear. Type in the QA code. If comments are being provided in the white field under “Remarks from Contractor” click for the text cursor and type “See attached comments.” Save the changes.



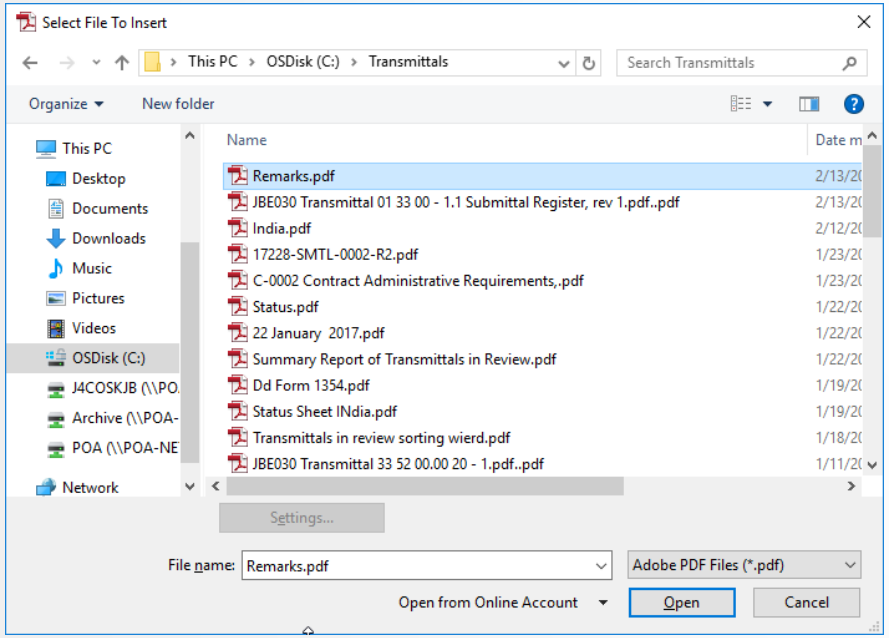


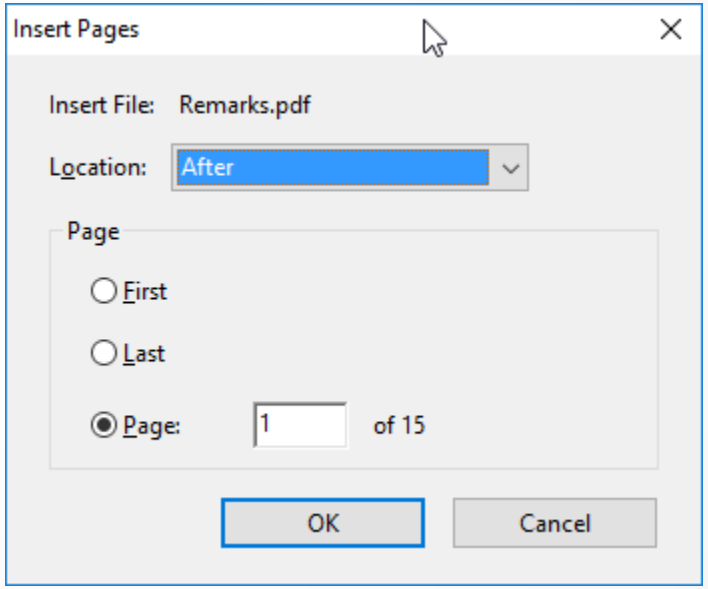
The contractor's document package, minus the 4025, will still be open in the background. Open it and right click on the first page. Select "Insert Pages" and select "From File…". Map to where the remarks for the transmittal were saved, highlight and click "Open".



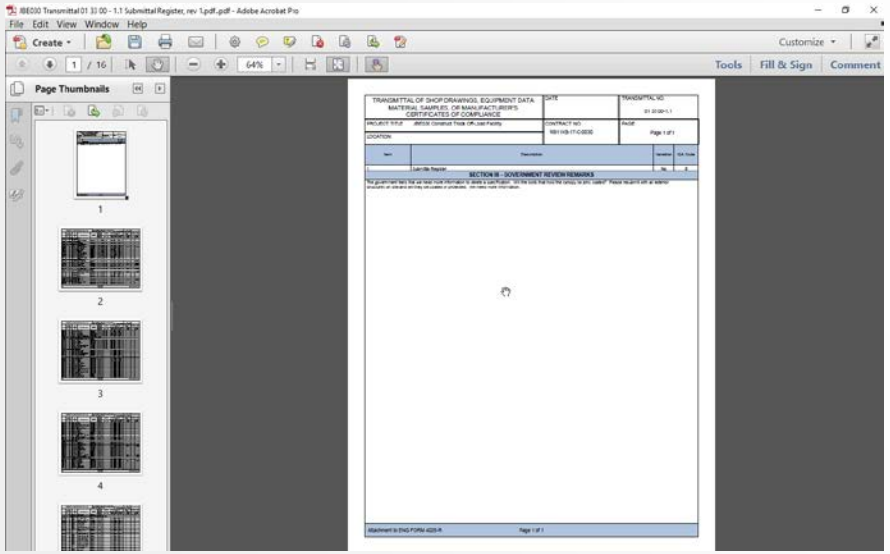


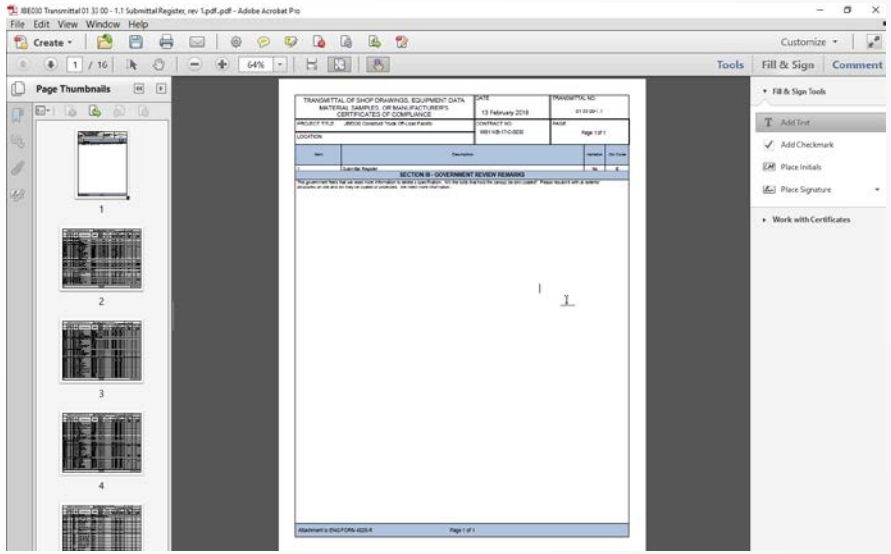
Do not use the default. Click the drop down menu and select before.



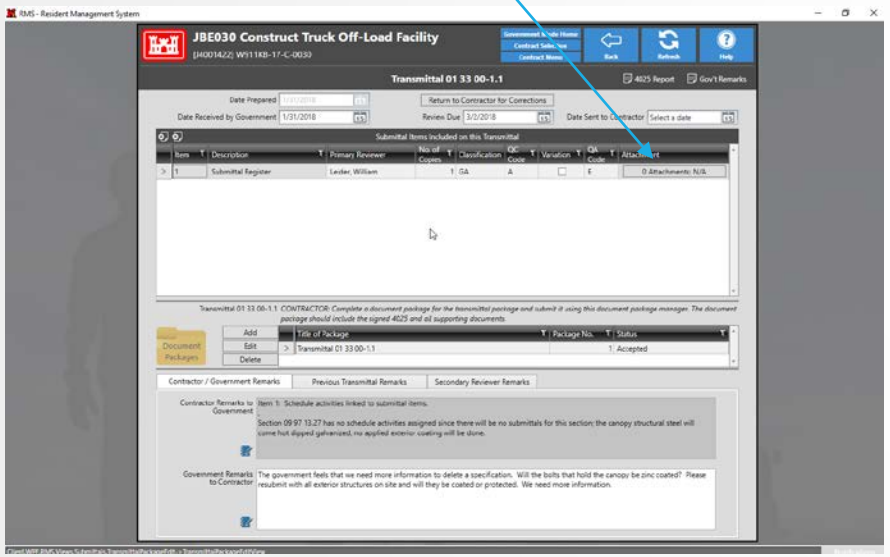


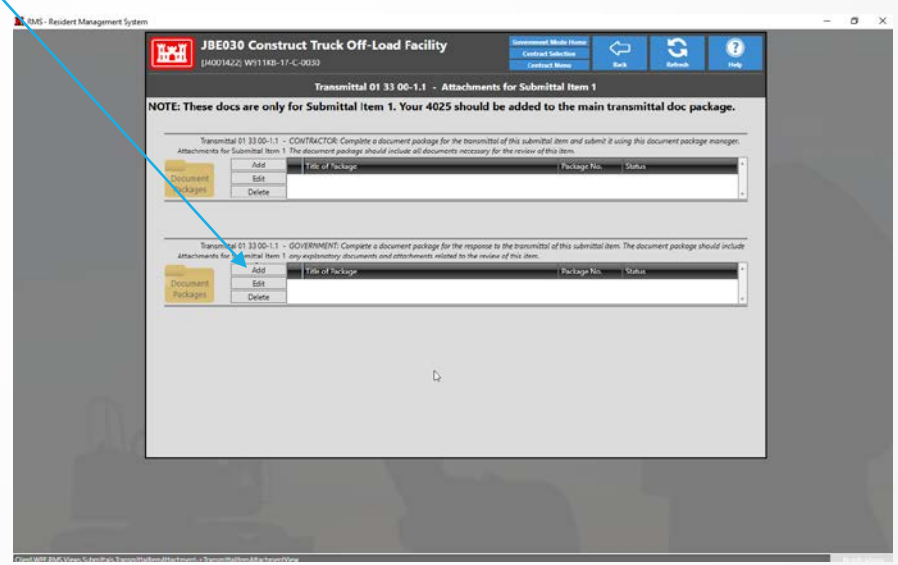
This will insert the remarks before the contractor's document package. Click "Save". Close all working PDF copies.





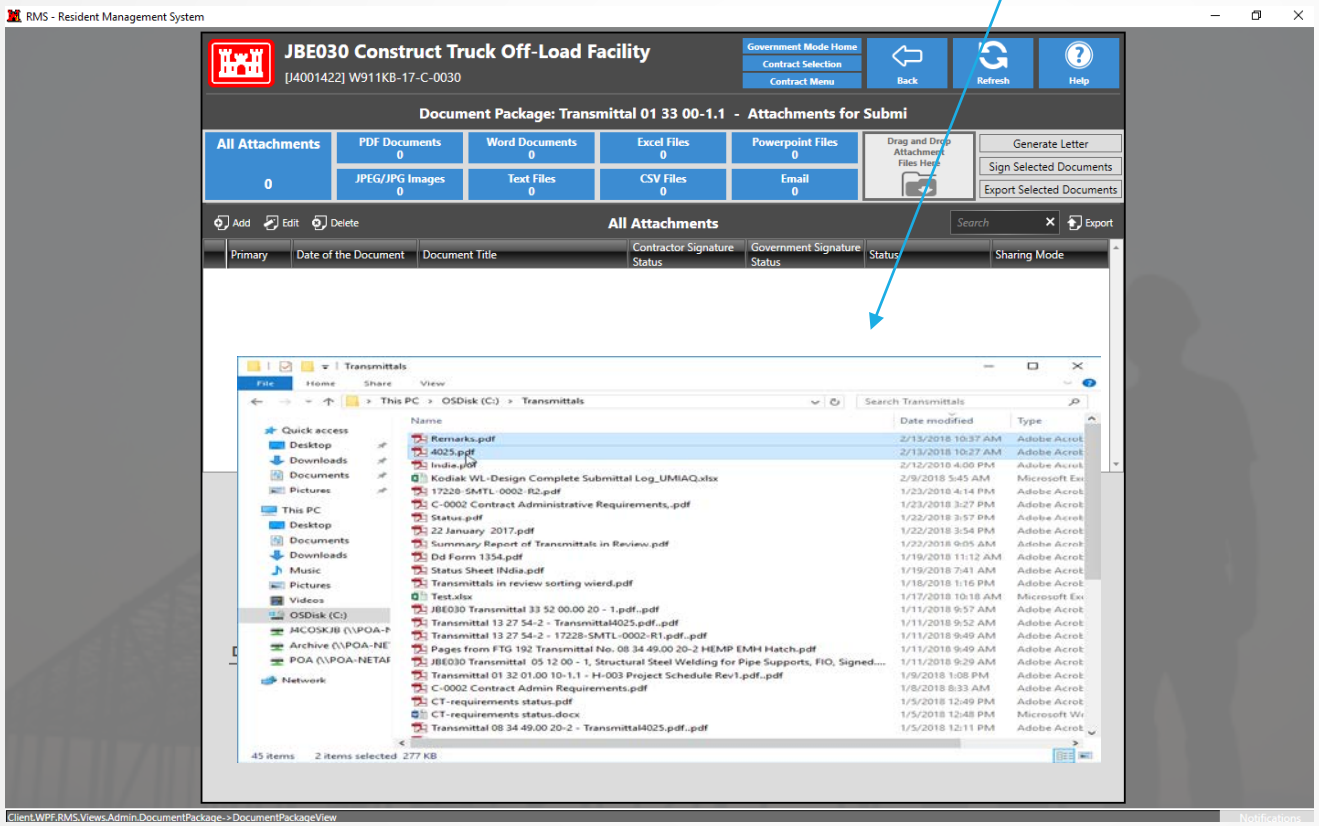
In RMS, click on the grey box under “Attachment”. Under “Attachments” click “Add” under Government “Document Packages”.



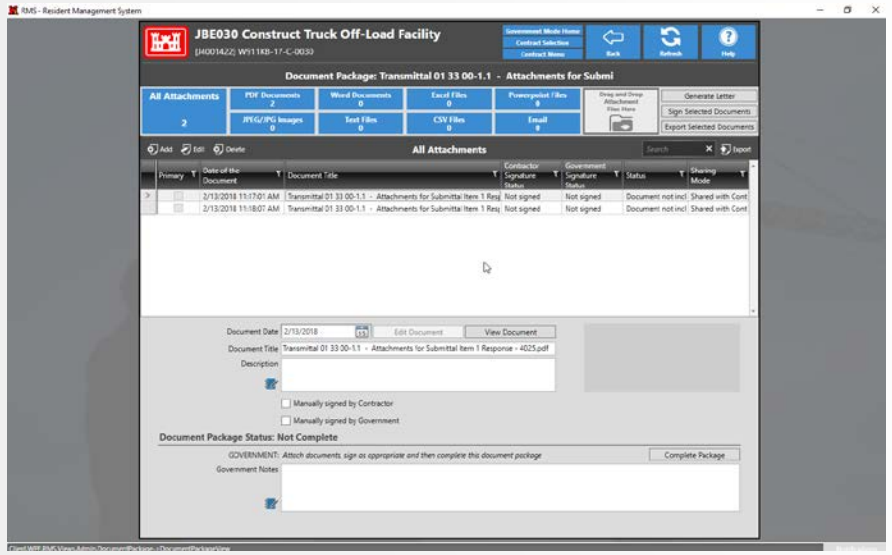


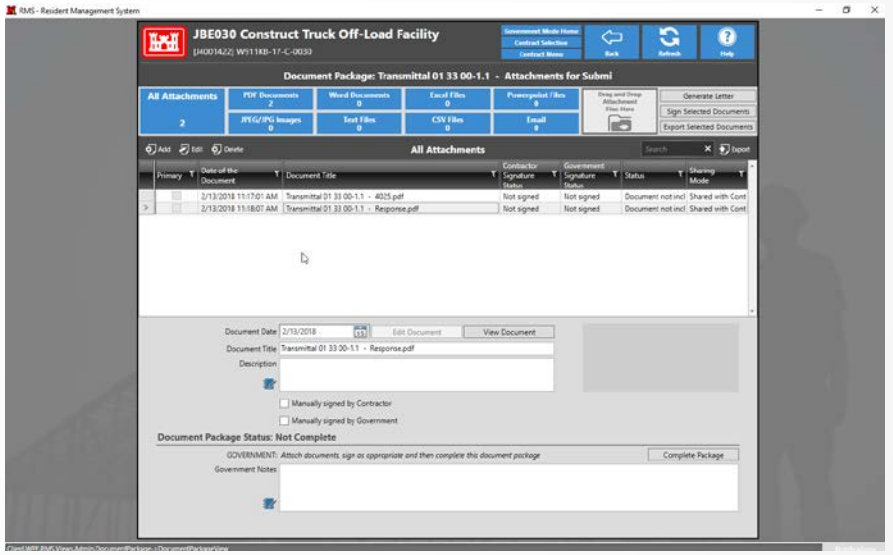
When “All Attachments” open up, bring up the working files. Drag and drop the marked up 4025 and the contractor’s document package with the remarks section added the white area provided.

Note: The number of files selected and the size of the files will effect the download time.



In “Document Title” the file names can be renamed. It is recommended that the 4025 is titled “4025” and the remarks be “Response”. Keep “Transmittal XX XX XX-X” at the beginning of the “Document Title”.





Note: A FIO/DA that is either being out-processed without prior review or a reviewed FIO/DA, that is “F” coded is the only transmittal package that be loaded into RMS as a single attachment because it does not require a signature.

All other transmittals need to have a minimum of two attachments.

Per District/Office Policy, inform the ACO/COR that the transmittal is ready for signature.

Signing and Out-processing transmittals are covered in a different step-by-step.