



FAQ - How do I install a Custom Transmittal?

Question

How do I install a custom transmittal?

Answer

QDMS supports an unlimited number of transmittal formats. Custom transmittal formats are supplied by QA Software and installed by the Customer.

Which format is used when transmitting documents to any individual recipient is controlled as follows:

- (a) If a custom format is defined in the **Address Book** against a Recipient, this format is used for this recipient only.
- (b) If a custom format is defined for a **Circulation List** this format will be used when transmitting to a Circulation List only.
- (c) If a custom format is defined under the **Project Settings** for the current project and no format is defined as per (a) or (b) above, this format is used for all transmittals on this project only.
- (d) If a custom format is defined in the **Program Defaults** and no format is defined in either (a), (b), or (c) above, this format is used for all transmittals on all projects.

To define a Custom Transmittal in the Program Defaults (Typical)

- (a) Unzip and copy the custom files supplied into the QDMS folder.
- (b) Enter QDMS and select any project.
- (c) From the Tools menu, select Options.
- (d) Click on the Program Defaults tab.
- (e) Click the Edit button.
- (f) In the Custom Transmittal Type 1 and Type 2 fields, enter the name of the Custom Transmittal supplied. (For example you might enter ZMCTRMT in both fields)
- (g) Click the Save button.
- (h) Close, quit and restart QDMS for the changes to take effect.

To define a Custom Transmittal in the Project Settings

- (a) Enter QDMS and select the required Project.
- (b) From the Tools menu, select Options.
- (c) Click on the Project Settings tab.
- (d) Click the Edit button.
- (e) In the Custom Transmittal Type 1 and Type 2 fields, enter the name of the Custom Transmittal supplied. (For example you might enter ZMCTRMT in both fields)
- (f) Click the Save button.
- (g) Close, quit and restart QDMS for the changes to take effect.



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To define a Custom Transmittal for use with a Circulation List

- (a) Enter QDMS and select the required project.
- (b) From the Wizards menu select Circulation List Wizard.
- (c) Follow the wizard prompts until you get to the last page where you can define a custom transmittal format.
- (d) In the Custom Transmittal Type 1 and Type 2 fields, enter the name of the Custom Transmittal supplied. (For example you might enter ZMCTRMT in both fields).
- (e) Click Next and then Finish.

To define a Custom Transmittal in the Address Book

- (a) Enter QDMS and select the required project.
- (b) From the View menu, select Address Book.
- (c) Locate the Recipient.
- (d) Click on the Default Details Tab.
- (e) In the Custom Transmittal Type 1 and Type 2 fields, enter the name of the Custom Transmittal supplied. (For example you might enter ZMCTRMT in both fields).
- (f) Click the Close button.

Further information on issue

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