

Create Expected / Generate Transmittals

The Create Expected/Generate Transmittals screen is used to create expected documents and generate transmittals for items in bulk. Use when the Items List is filtered down to results that the user has the documents for or expects to receive documents for.

To reach the Create Expected/Generate Transmittals screen, select **Create Expected/Generate Transmittals** from the Actions Menu on the [Study Items List](#) page, [Favorite Study Items](#) page, or [Study Items Clipboard](#). If there are more than 50 items listed on the page you will receive a warning that the operation can only be performed on a maximum of 50 items at a time. Selecting Ok will allow you to proceed with the first 50 items selected.

Reasons for an Alert

You may receive an alert that some of the selected study items could not have an [Expected Document](#) created for them. Potential reasons for why study items could not have an expected document created for them include that the study is locked or archived, the study item is [Ad-hoc](#) or proposed, or the study item is at the enterprise or program level.

How to use the Create Expected/Generate Transmittals Screen

From the Create Expected/Generate Transmittals screen, choose one of the two options based on the documents that you have selected.

Option 1: "I have received these documents." Use this option when you have received the selected documents already and want

to create Expected Documents in your [Work Area](#) for them.

Option 2: "I plan to receive these documents." Use this option when you have not yet received the selected documents but wish to generate [Transmittal](#) for them now so they can be [Indexed](#) once they are scanned.

By default all documents in the list will be selected. Any documents which you do not wish to Create Expected Documents for can be deselected by clicking the green box next to that option.

When only the appropriate documents are selected, click **Create Expected Documents** to finalize the operation.