



Submittal Training Guidev2



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Submittals

Accessing the Submittal Module

Creating a Submittal Registry

- *Importing the registry*
- *Adding Items one at a time*

Updating Submittal Items

- *Sending to Subcontractor*
- *Attaching Documents*

Submitting to Architect

- *Creating a submittal package*
- *Sending the package for review*

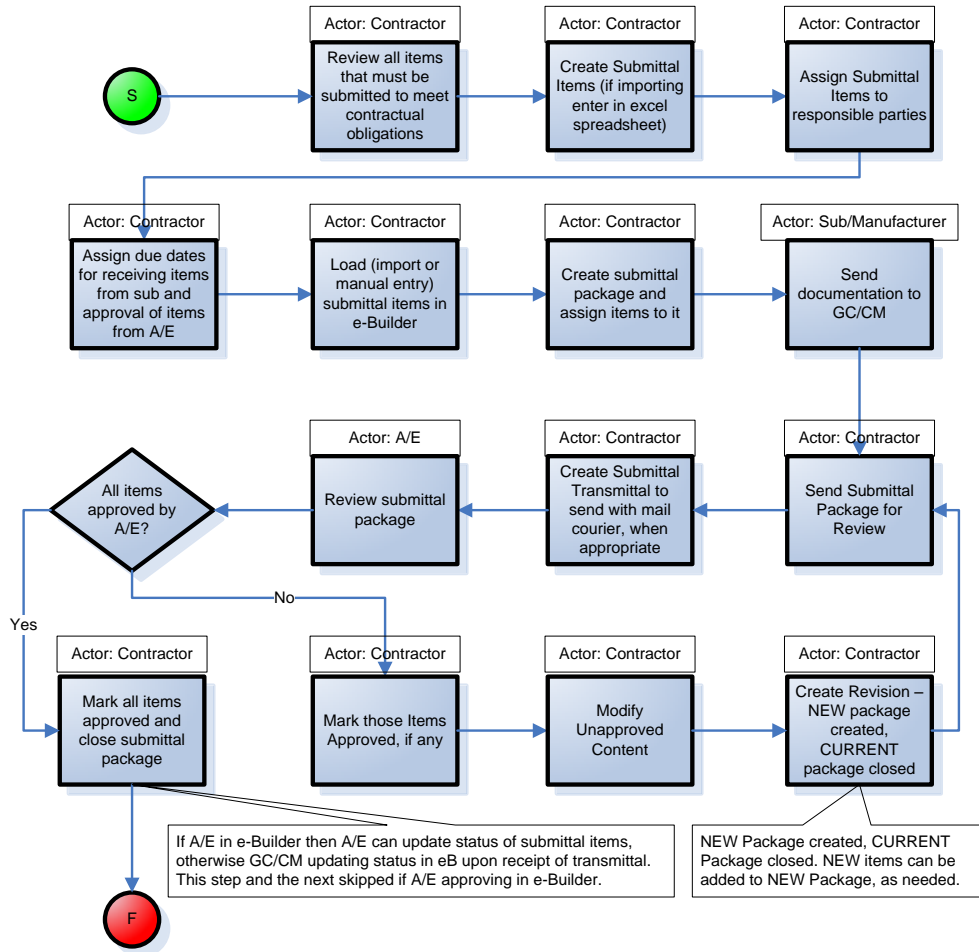
Reviewing the Package

- *Sending to Consultants*
- *Updating the Status*
- *Returning the package to the Contractors*

Completing the Package

- *Revise and Resubmit*
- *Closing Items*

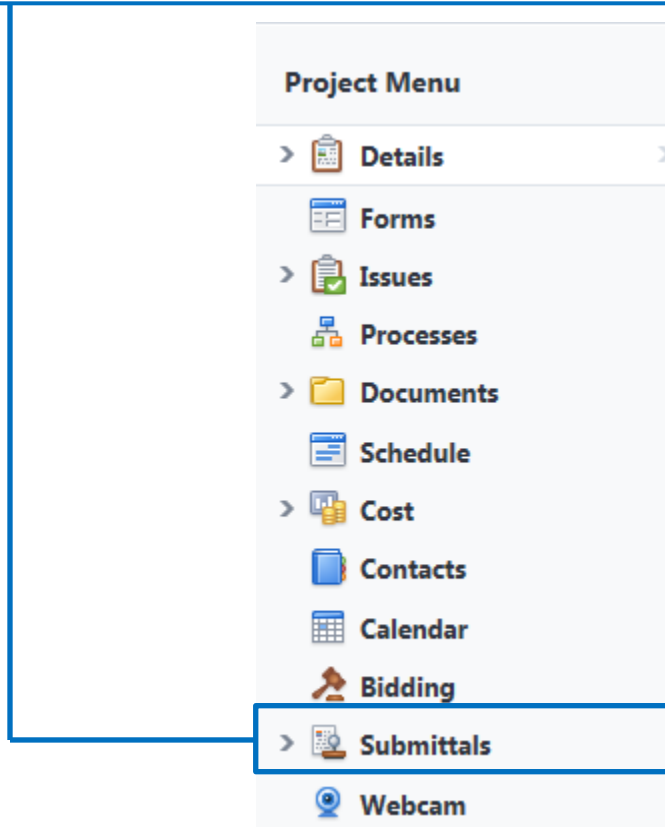
Typical Submittal Process



Accessing the Submittal Module

The following are the steps to accessing the submittal module:

1. Select the Project you are accessing. You can do so by select the project from the dropdown list on the home page or going to a tab and selecting the project.
2. On the left side, click the Project Submittals link.



Submittal Module: Initial Setup

The screenshot shows the 'Submittals' settings page for a project named 'Bond Project Training Day 1'. The 'Settings' menu item is highlighted with a blue box. A blue line connects this box to a callout box on the right. The callout box contains the following text:

Step 1: Initial Setup
In the initial setup, the user will click on 'Settings' in the Submittals project menu. The user will identify the 'Submittal Coordinator'. The Submittal Coordinator is who will ultimately review the submittal items for approval.

There can be multiple 'Submittal Coordinators' assigned to the submittal module for a project. The 'Submittal Coordinator' must be a licensed e-Builder user.

Once the 'Submittal Coordinator (s)' is selected the user will click 'Save' to complete the task.

The interface includes the following fields and options:

- Project: Bond Project Training Day 1
- Complete Review Date Due Offset: 14
- Offset Type: Calendar Days, Working Days
- Specify Default Folder For Attachments: Documents \ [Change folder] [Remove Folder]
- * Submittal Coordinator: Select From: All Roles. List includes Adam Schwartzman, Ben Willey, Bennett Wiggins, Brian Peterson, Clifton Thomas, Dave Roberts, Dietrich vonBiedenfeld, Dorothy Bergeson, Gerson Acosta, Glenn Jarrett. Selected: Allen Sherrill, Brenda Turner Prejean.
- Who to Notify: 2. Roles list includes Accounting Director, Architect, Campus Manager, Capital Project Accountant, Compliance, Construction Inspector, Construction Project Manager, Director Of Facilities Maintena, eB Admin.
- Buttons: Save, Cancel

Creating a Submittal Registry

Contractor will create a log of all the items to be submitted for the project. This log can be created in Excel and imported into e-Builder or it can be entered into the system one by one. There are (2) methods of entering item and package information into the Submittals Module:

- **File Import**
- **Manual Entry**

File Import

If your import file column headers map the e-Builder field names, it will allow you to import your data without having to complete any field mappings. The following are the e-Builder field names:

Filter Submittal Items

All Pending my review

Title:

Status:

Number:

Revision:

Submittal Package #: - -

Rev:

Responsible Sub/Manufacturer:

Custom Field 1:

Open Closed Draft Overdue

Description:

Category:

Priority:

Spec Section:

Sub Section:

Custom Field 2:

Clear Filter

Group By: None Page 1 of Show 25 per page

Add to Package Add Item Delete **Import**

Item Details	Title	#	Rev #	Package #	Spec Section	Sub Section	Category	Status	Held By
There are no items.									

1

Step 1: Click Import

To start the process of importing a Submittal Register, the user will click the 'Import' button on the bottom right of the Submittal Register page.

- Submittals
 - Submittal Register**
 - Submittal Packages
 - Update Dates
 - Settings

2

Step 2: Browse for File

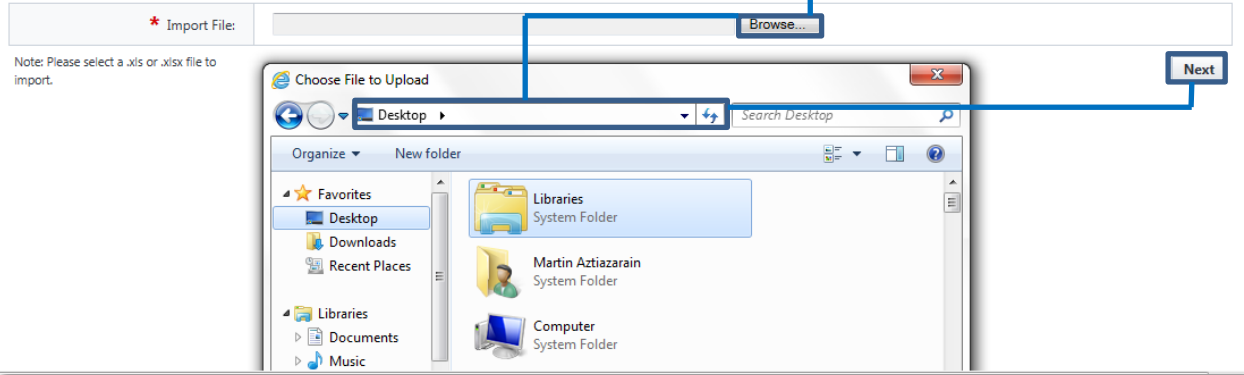
Upon clicking the 'Import' button, the user will initiate the (3) step wizard for importing. The user will perform the following tasks in Step 1 of 3 in the wizard:

- Click 'Browse'
- Upon opening the window for selecting a file, the user will double click on the desired 'Submittal Import' file (i.e. .xls or .xlsx file.)
- Once the file has been selected the user will click on the 'Next' button

Import Submittal Register for Bond Project Training Day 2 - Select Import File

Step 1 of 3

Choose your Import File

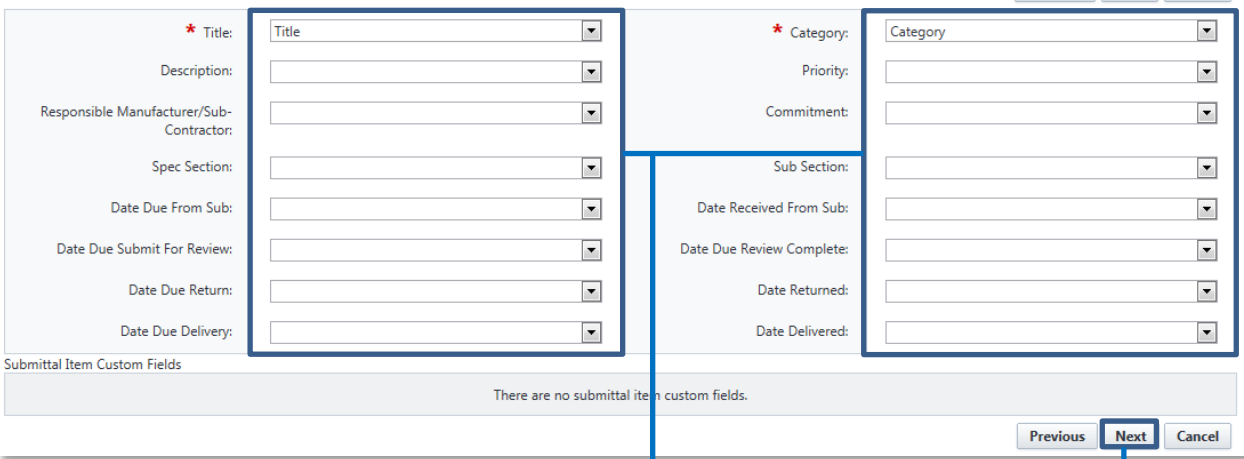


Note: The file type must be in Microsoft - .xls or .xlsx

Import Submittal Register for Bond Project Training Day 2 - Field Mappings

Step 2 of 3

Submittal Item Built-In Fields



	A	B	C	D	E	F	G	H
	Project Name	Package Title	Title	Number	Revision Number	Status	Category	Package Number
1								
2	Training - PoAV		Speakers		1		Product Data	3
3								
4								
5								
6								
7								
8								
9								
10								
11								
12								
13								
14								

3

Step 3: Browse for File

Upon selecting the file, the user, in Step 2 of 3 in the wizard, will map the column headers in the appropriate fields:

- Click the 'Drop-Down' menus that best match the column headers in your imported table. NOTE: Title of Item and its Category are required.)
- Upon mapping your column headers, click 'Next' to proceed to the final step.

Import Submittal Register for Bond Project Training Day 2 - Review

Step 3 of 3

Import File Summary

Previous Import Cancel

File Name:	PPS Submittal Import.xls	Rows In File:	1
Rows To Be Imported:	1	Rows With Exceptions:	0

Preview (Row 2) Exceptions (0)

Submittal Item Built-In Fields

Title:	Speakers	Category:	Product Data
Description:		Commitment:	
Priority:	Normal	Sub Section:	
Spec Section:		Date Received From Sub:	
Responsible Sub/Manufacturer:		Date Due Review Complete:	
Date Due From Sub:		Date Returned:	
Date Due Submit For Review:		Date Delivered:	
Date Due Return:			
Date Due Delivery:			

4

Step 4: Check for Exceptions

Upon completing the field mapping the user will reach step 4 of 4 of the wizard. It is in this step that the user will have visibility to any exceptions that may exist in the file being imported (i.e. empty rows, incorrect data type, etc.)

Note: If there are any exceptions, you will want to make note of them, cancel the import, correct the exceptions in the file and then re-import the file in.

Adding Submittal Items (Manual Entry)

1

Step 1: Adding an Item
To start the process of importing a Submittal Register, the user will click the 'Add Item' button on the bottom right of the Submittal Register page.

2A

Step 2A: Item Details
To begin entering an item, the user will enter the 'Title' and 'Category' of item.

2B

Step 2B: Date Details

The user will enter 'Target Dates' for the item. Target dates represent when the items listed below are targeted for completion. Upon completing this task, the user will click the 'Save' button.

Date Details

Target	Actual
Date Due From Subcontractor: ?	Date Received From Subcontractor: ?
Submit For Review Due Date: ?	Date Submitted For Review: ?
Review Complete Due Date: ?	Date Review Completed: ?
Consultant Respond By Date: ?	Consultant Review Complete Date: ?
Return Due Date: ?	Date Returned: ?
Delivery Due Date: ?	Date Delivered: ?

Custom Fields

There are no custom fields for this submittal item.

Save & Add New Save Cancel

Creating a Submittal Package

The submittal items managed for a project can be packaged in the e-Builder system. The packages can be categorized by trade or CSI code, depending on the needs of the user managing the items. Once a Submittal Package is created, items contained in the Submittal Register can be added to their perspective package and transmitted for a formal review.

1

Step 1: Create Package
 To start the user will click on 'Submittal Packages' in the Submittals Project Menu. Once on the main page, the user will click 'Create Package' on the lower right of the screen.

Submittals

- Submittal Register
- Submittal Packages**
- Update Dates
- Settings

Submittal Packages For: Bond Project Training Day 1

Filter Submittal Packages

All Pending My Review

Open Closed Draft Overdue

Description:
 Trade:
 Submittal Package #: - -
 Rev:
 Priority:
 Custom Field 1:
 Custom Field 2:

Clear Filter

Page 1 of Show 10 per page

Title	Description	Package #	Revision Number	Status	Held By
There are no Submittal Packages.					

Create Package

2

Step 2: Package Details
 The user will enter the 'Submittal Package Name' and click the 'Save' button. Note: the package can be categorized utilizing both 1995 or 2004 CSI Codes.

Add Submittal Package

Details

Project: Bond Project Training Day 1

Project Number:

* Submittal Package Name:

Description:

Submittal Package #: 1 - 03 00 00 - CONCRETE - 0

Trade: Concrete

Save Cancel

Submittal Package: Add Submittal Item

Upon creating the Submittal Package(s), the user can now associate Submittal Items to its respective Submittal Package.

Step 1: Select Package
From the 'Submittal Package' screen, the user will select the package for which an item will be added.

Submittals

- Submittal Register
- Submittal Packages**
- Update Dates
- Settings

Filter Submittal Packages

All Pending My Review

Description:

Trade:

Submittal Package #: - -

Rev:

Priority:

Custom Field 1:

Open Closed Draft Overdue

Custom Field 2:

Page 1 of 1 Show 10 per page

Title	Description	Package #	Revision Number	Status	Held By
<input type="checkbox"/> Submittal Package Name	Submittal Package	1-03 00 00-0	0	Draft	

Step 2: Add Item
Once the user has accessed the package details page they are to click the 'Add Items' button on the bottom right of the screen. A screen will be displayed providing the user with (2) options:

- Add Existing Item:** Selected when the item that is to be attached is entered in the Submittal Register
- Add New Items:** Selected if a Submittal Item is entered into the system while adding the item to the package.

Add to Package

Add Existing Items

Add New Items

3

Step 3: Select Item

Once the user has established an item in the register or entered a new item the item must be selected in the check box. Once the item is selected the user will click the 'Add To Package' button on the lower right of the page.

Filter Submittal

Description:	<input type="text"/>	Category:	<input type="text" value="Please select a category..."/>
Title:	<input type="text"/>	Spec Section:	<input type="text"/>
Number:	<input type="text"/>	Sub Section:	<input type="text"/>
Responsible Sub/Manufacturer:	<input type="text"/>	Priority:	<input type="text" value="Please select..."/>
Custom Field 1:	<input type="text" value="Please select a custom field..."/>	Custom Field 2:	<input type="text" value="Please select a custom field..."/>

Group By: Page of 1 Show per page **Add to Package**

<input type="checkbox"/>	Title	# ▲	Spec Section	Sub Section	Category	Status
<input checked="" type="checkbox"/>	Concrete Mix Design	1			Product Data	NEW

Updating Submittal Items

In preparation to send the item to the Architect for review, the Contractor has the ability to send the item to the Subcontractor to attach the documentation to be submitted or the Contractor can upload the documentation and attach it to the item.

Attaching Documents

If the Contractor has the documents to be submitted to the Architect, they have the ability of attaching the documents without sending the item to the Sub.

Submittal Register for Bond Project Training Day 1

Filter Submittal Items

All Pending my review

Open Closed Draft Overdue

Title:

Description:

Status:

Category:

Number:

Priority:

Revision:

Spec Section:

Submittal Package #: -

Sub Section:

Rev:

Responsible Sub/Manufacturer:

Custom Field 1:

Custom Field 2:

Group By: Page of 1 Show per page

Item Details	Title	#	Rev #	Package #	Spec Section	Sub Section	Category	Status	Held By
	Concrete Mix Design	1	0				Product Data	NEW	

Item Details

0

1

Step 1: Attach Icon
The user will select the document attachment icon to begin the process of attaching a document associated with the Submittal Item selected.

2

Step 2: Attach File
The user will click the 'Add' button and the e-Builder Upload window will be displayed. The user will 'Browse for Files' and upload to the submittal item window.

Note: As documents are uploaded, utilizing the exact file name will execute Version Control.

Attached Documents - Concrete Mix Design - #1

File Name	Attached By
There are no documents attached to this submittal	

Attach Documents from Bond Project Training Day 1

Project: Bond Project Training Day 1
Submittal Item: Concrete Mix Design

1) Select Attachment Method

Upload and attach file(s) from your computer
 Attach files from the e-Builder Document module for the Bond Project Training Day 1 project

2) Select Files to Upload from Your Computer Switch to Individual File Upload Tool

Tip: You can drag and drop multiple files into the white box on this page. Only checked files will be uploaded.

Xref Search Option Compress for Transfer

Number of Items: 0 | Total Upload Size: 0B | Approx. Upload Time: 111 = 0 min 56s = 0 min

Adding Comments

As submittal items are entered into the Submittal Module they are reviewed and as a result the reviewers will provide commentary throughout the review process. Adding comments can be done for all items from the Submittal Register screen.

Submittal Register for Bond Project Training Day 1

Filter Submittal Items

All Pending my review

Open Closed Draft Overdue

Title:

Description:

Status:

Category:

Number:

Priority:

Revision:

Spec Section:

Submittal Package #: -

Sub Section:

Rev:

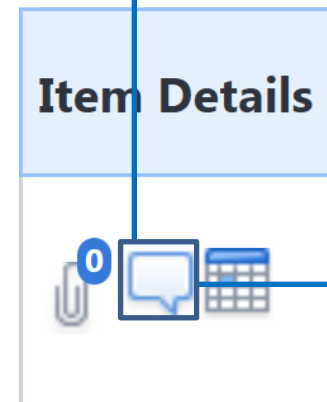
Responsible Sub/Manufacturer:

Custom Field 1:

Custom Field 2:

Group By: Page 1 of 1 Show 25 per page

Item Details	Title	#	Rev #	Package #	Spec Section	Sub Section	Category	Status	Held By
	Concrete Mix Design	1	0				Product Data	NEW	



1

Step 1: Comment Icon
The user will select the comments icon to begin the process of adding a comment associated with the Submittal Item selected.

2

Step 2: Add Comment
The user enter the desired comment in the text box and click the 'Add Comment' button.

Comments - Concrete Mix Design (#1)

Add Comment

Comment:

Private:

Comments

There are no comments for this submittal item.

Viewing / Adding / Editing Submittal Dates

As submittal items are entered into the Submittal Module targeted dates are identified and actual dates are recorded. The dates can be tracked from the Submittal Register page.

Submittal Register for Bond Project Training Day 1

Filter Submittal Items

All Pending my review

Open Closed Draft Overdue

Title:

Description:

Status:

Category:

Number:

Priority:

Revision:

Spec Section:

Submittal Package #: -

Sub Section:


Rev:

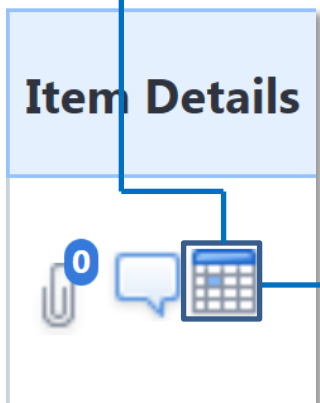
Responsible Sub/Manufacturer:

Custom Field 1:

Custom Field 2:

Group By: Page 1 of 1 Show 25 per page

Item Details	Title	#	Rev #	Package #	Spec Section	Sub Section	Category	Status	Held By
	Concrete Mix Design	1	0				Product Data	NEW	



1

Step 1: Date Icon
The user will select the date icon to review critical Submittal dates

2

Step 2: View / Enter/Edit
Upon clicking the date icon, the date screen for the related submittal item will be displayed. It is here that the user will be able to perform one of the following tasks:

- Initially establish Target Dates
- View and Edit existing dates
- View system generated Actual Dates.

Date Details - Concrete Mix Design

Target	Actual
Date Due From Subcontractor: <input type="text"/>	Date Received From Subcontractor: <input type="text"/>
Submit For Review Due Date: <input type="text"/>	Date Submitted For Review: <input type="text"/>
Review Complete Due Date: <input type="text"/>	Date Review Completed: <input type="text"/>
Consultant Respond By Date: <input type="text"/>	Consultant Review Complete Date: <input type="text"/>
Return Due Date: <input type="text"/>	Date Returned: <input type="text"/>
Delivery Due Date: <input type="text"/>	Date Delivered: <input type="text"/>

Submittal Review

Once the Submittal Items and Submittal Packages are prepared and ready for review, the Contractor will initiate the review process.

Submittal Package Review

When sending the package for review it is placing the package in the Submittal Coordinator's (Architect's) court and request a response by a specific date.

Step 1: Send for Review
Once the user has selected the Submittal Package with the associated Submittal Item(s), the user will click on the 'Send for Review' button to send Submittal Package for review.

Step 2: Select Coordinator / Due Date

- The user will select the coordinator that will review the Submittal Package.
- The user will select the Submittal Package Review Date.

The screenshot displays the 'Submittal Package Overview' and 'History' tabs. The 'Submittal Package Overview' section shows details for a 'Bond Project' submittal package, including its title, description, package number, creation date, and creator. The 'History' section shows a table of submittal items, with 'Concrete Mix Design' selected. The 'Send for Review' button is highlighted. The 'Send for Review' dialog box is shown, with the 'Submittal Coordinator' set to 'Martin Aztiazarain (e-Builder, Inc.)' and the 'Review Complete Due Date' set to '11.29.2013'. The dialog also includes a list of roles, a field for external users, and a message field.

Reviewing Submittal Package

Once the package has been submitted by the Contractor for review it is in the Submittal Coordinator's (Architect's) court to review the data, update the status and respond to the Contractor. The Submittal Coordinator will receive a notification that the package has been sent for review and the package details will display on the Submittal Coordinator home page.

The Submittal Coordinator has the ability to send the package to the Consultants for review and comments. The Consultants will be able to view and download the documents submitted by the Contractor, if they have comments or markup the document they have the ability to re-upload the document to the submittal item.

Sending to Consultants

From the Submittal Package Details screen:

Step 1: Select Coordinator / Due Date

- Select the item(s) you wish to forward to the Consultant
- Click the Forward button.

Step 2: Select Recipient

The user will enter the recipient details:

- Forward To e-Builder User: Select the Role and eB User
- Forward To External Recipient: Enter recipient's email.
- Respond By Date: Suggested deadline for the response.
- The user will click 'Forward' button.

The screenshot shows the 'Submittal Package Overview' and 'History' tabs. The 'Overview' tab displays project details: Project: Bond Project Training Day 1, Title: Submittal Package Name, Description: Submittal Package, Submittal Package #: 1-03 00 00-0, Date Created: 11.24.2013 6:24 PM, Items Held By: Martin Aztiazarain, and Baseline Start Range. The 'History' tab shows Status: Open, Trade: , Created By: Martin Aztiazarain, and Baseline Finish Range. Below this is a table with columns: Item Details, Title, # ^, Rev #, Spec Section, Sub Section, Category, Status, and Held By. The table contains one row: Concrete Mix Design, 1, 0, Product Data, NEW, Martin Aztiazarain. At the bottom of the table are buttons for 'Update Status', 'Send to Contractor', and 'Forward'. A callout box labeled '1' points to the 'Forward' button. Below the table is a form for selecting a recipient. It includes a dropdown for 'Forward To' (currently '--Select a Role (Optional)--'), another dropdown for 'Recipient' (currently '--Select Recipient--'), and a text input for 'External User' with a 'Lookup' button. There are also radio buttons for 'Send Type' (Action Required and Notify Only) and a 'Respond By' field with a calendar icon. A callout box labeled '2' points to the 'Forward' button in this form.

'Held By' Status

Once a Submittal Item is in the Submittal Coordinator's court the user has the option to click the 'Forward for Review' button as displayed below. Typically this action is taken when the Submittal Coordinator requires a supplemental review by either an e-Builder user and or an external user such as a consultant.

Filter Submittal Items

All Pending my review

Title:

Status:

Number:

Revision:

Submittal Package #: - - Rev:

Responsible Sub/Manufacturer:

Custom Field 1:

Custom Field 2:

Description:

Category:

Priority:

Spec Section:

Sub Section:

Submittal Coordinator:

Reviewer:

Open Closed Draft Overdue

Clear Filter

Group By: None Page 1 of 1 Show 100 per page

Update Status **Forward for Review** Add to Package Add Item Delete Import

Item Details	Title	#	Rev #	Package #	Spec Section	Sub Section	Category	Status	Submittal Coordinator	Held By	Reviewers
<input checked="" type="checkbox"/>	IBA Test	72	0	2-08 44 13-0			Test Report	NEW	Martin Aztiazarain	Martin Aztiazarain	Reviewers
<input checked="" type="checkbox"/>	window openings	73	0	19-00 01 15-0	wind loads	test results	Calculations	NEW	Martin Aztiazarain	Martin Aztiazarain	Reviewers
<input checked="" type="checkbox"/>	Concrete pour sequence	74	0	2-01 00 00-0	03 10 00		Shop Drawing	NEW	Martin Aztiazarain	Martin Aztiazarain	Reviewers

Forward For Review

Forward for Review Cancel

Project: Training - Swire Properties

* Forward To:

- Escalante, Grace (Swire Properties Inc)
- Gonzalez, Natalie (Swire Properties Inc)
- Michael Ricard, Paul (NV5)
- Mooney, Mark (Swire Properties Inc)
- Myburgh, Charl (Swire Properties Inc)
- Pradilla, Gustavo (Swire Properties Inc)
- Rodriguez, Johnny (Swire Properties Inc)
- Schram, Joseph (NV5)
- Sproul-GMAIL, Stephen (e-Builder, Inc.)
- Sproul, Stephen (e-Builder, Inc.)

and/or Enter external user (email)

Lookup You can add additional email addresses one per line or separate them with a semicolon ";".

Send Type: Action Required Notify Only

* Respond By:

The Submittal Coordinator ultimately remains the owner of the submittal item and has the ability to select the status of an item and send it back to the contractor at any time. A separate column in the Submittal Register labeled as 'Held By' indicates to whom the Submittal Coordinator has forwarded the Submittal Item to and enables the accurate tracking of who is simultaneously reviewing it.

Item Details	Title	#	Rev #	Package #	Spec Section	Sub Section	Category	Status	Submittal Coordinator	Held By	Reviewers
	F&W Temporary Shoring w/Calcs	5	0	2-02200-0	02200		Mock Up	Revise	Rick Quigley	Dan Calia, pwhitmore@e-Builder.net	Reviewers
	Sanitary Drainage /Water Piping/Specialities	6	0	1-02260-0	02268		Product Data	NEW	Dan Calia	Dan Calia	Reviewers
	Meter for Water Piping	7	0	1-02260-0	02268		Sample	NEW		Dan Moskowitz	
	Unit Pavers	8	1	3-02760-1	02780		Shop Drawing	Approv	Dan Calia	Dan Calia	Reviewers

If a user needs to know which of the reviewers in the 'Held By' column has completed their review and or are still in the process of reviewing the 'Reviewers' link is clicked and it will provide that information.

Item Details	Title	#	Rev #	Package #	Spec Section	Sub Section	Category	Status	Submittal Coordinator	Held By	Reviewers
	F&W Temporary Shoring w/Calcs	5	0	2-02200-0	02200		Mock Up	Revise	Rick Quigley	Dan Calia, pwhitmore@e-Builder.net	Reviewers
	Sanitary Drainage /Water Piping/Specialities	6	0	1-02260-0	02268		Product Data	NEW	Dan Calia	Dan Calia	Reviewers
	Meter for Water Piping	7	0	1-02260-0	02268		Sample	NEW		Dan Moskowitz	
	Unit Pavers	8	1	3-02760-1	02780		Shop Drawing	Approv	Dan Calia	Dan Calia	Reviewers

Reviewers for F&W Temporary Shoring w/Calcs

Reviewer	Requested By	Date Requested	Date Due	Review Completed Date
Dan Calia	Pam Whitmore	01.03.2014	01.10.2014	
pwhitmore@e-Builder.net	Pam Whitmore	01.03.2014	01.10.2014	

Close

Updating the Status

Once the submittal item has been reviewed, the Architect should update the status of the item.

From the Submittal Details screen:

Step 1: Select Recipient

- In the item row, go to the status column and select the status in the drop down list

Step 2: Select Recipient

- A popup will appear where you can enter your notes regarding this item.
- Click 'Save' button.

Request Comment **Generate Transmittal**

Project: Bond Project Training Day 1
Title: Submittal Package Name
Description: Submittal Package
Submittal Package #: 1-03 00 00-0
Date Created: 11.24.2013 6:24 PM
Items Held By: Martin Aztiazarain
Baseline Start Range:

Project Number:
Status: Open
Trade:
Created By: Martin Aztiazarain
Baseline Finish Range:

Items (1) Documents (0) Comments (0) Custom Fields (0) Revisions (0)

Group By: None Page 1 of 1 Show 25 per page

Update Status **Send to Contractor** **Forward**

Item Details	Title	#	Rev #	Spec Section	Sub Section	Category	Status	Held By
	Concrete Mix Design	1	0			Product Data	NEW	Martin Aztiazarain

Prefix Status

	NEW
APP	Approved
AAN	Approved As Noted
FRO	For Record Only
ONH	On Hold
REJ	Rejected
RAR	Revise & Resubmit

New Status: Approved

Add Comment

Comment:

Private:

Comments

There are no comments for this submittal item.

Check Spelling **Save** **Cancel**

Returning the Package to the Contractor

Once all the statuses have been updated the package is ready to be sent back to the Contractor.

From the Package Details screen:

1

Step 1: Send To Contractor

- Click on the Send to Contractor button.
- It will automatically list the Contractor that sent the package to you as your Send To person.
- If you wish to copy any internal and external users you have the ability to do so.
- Enter your message.
- Click Send to Contractor.

Submittal Package Overview

Request Comment Generate Transmittal

Project: Bond Project Training Day 1
Title: Submittal Package Name
Description: Submittal Package
Submittal Package #: 1-03 00 00-0
Date Created: 11.24.2013 6:24 PM
Items Held By: Martin Aztiazarain
Baseline Start Range:

Project Number:
Status: Open
Trade:
Created By: Martin Aztiazarain
Baseline Finish Range:

Items (1) Documents (0) Comments (0) Custom Fields (0) Revisions (0)

Group By: None Page 1 of 1 Show 25 per page

Update Status **Send to Contractor** Forward

Item Details	Title	#	Rev #	Spec Section	Sub Section	Category	Status	Held By
	Concrete Mix Design	1	0			Product Data	NEW	Martin Aztiazarain

Send to Contractor Cancel

Project: Bond Project Training Day 1
Project Number:
Title: Submittal Package Name
* Send To: Martin Aztiazarain
CC: -- Roles --
Accounting Director
Architect
Campus Manager
Capital Project Accountant
Compliance
Construction Inspector
Construction Project Manager
Director Of Facilities Maintenance
eB Admin

Completing the Package

Revise and Resubmit

If the status of an item is Revise and Resubmit, the Contractor will need to create a revision to the package to resubmit the items that have been requested.

From the Package Details screen:

1. Select the item(s) to be revised.
2. Click the Create Revision button
3. Click Save to save the Revision package.
4. Start the submittal processes over again.

Note: When a revision package is created, the last number in the package number is updated to reflect what revision number this revision is to that package.

Submittal Package Overview **History**

Project:	Bond Project Training Day 1	Project Number:	
Title:	Submittal Package Name	Status:	Revise & Resubmit
Description:	Submittal Package	Trade:	
Submittal Package #:	1-03 00 00-0	Created By:	Martin Aztiazarain
Date Created:	11.24.2013 6:24 PM	Baseline Finish Range:	
Items Held By:	Martin Aztiazarain		
Baseline Start Range:			

Items (1) Documents (0) Comments (0) Custom Fields (0) Revisions (0)

Group By: None Page 1 of 1 Show 25 per page

Item Details	Title	#	Rev #	Spec Section	Sub Section	Category	Status	Held By
	Concrete Mix Design	1	0			Product Data	RAR	Martin Aztiazarain

Add Submittal Package

Details

Project:	Bond Project Training Day 1
Project Number:	
* Submittal Package Name:	<input type="text" value="Submittal Package Name"/>
Description:	<input type="text" value="Submittal Package"/>
Submittal Package #:	1 - 03 00 00 - 1
Trade:	<input type="text"/>

Closing Items/Package

If there are items that review has been complete by the Architect and no revision is needed, the Contractor can close the item if they agree with the response. The Contractor should create revisions for all items that need to be revised before closing out the completed items.

From the Package Details screen:

1. Click the Close button.
2. Select Continue on the confirmation page.

Submittal Package Details

Submittal Package Overview **History**

Request Comment Update Dates Generate Transmittal **Close** Edit

Project: Training - Swire Properties
Title: DWG_FAF_EH_1M_ST_Level 1M top and bottom
Description: DWG_FAF_EH_1M_ST_Level 1M top and bottom
Submittal Package #: 12-03 20 00-0
Date Created: 09.20.2013 10:46 AM
Items Held By: Laurent Foury
Baseline Start Range: 10.04.2013 - 10.04.2013

Status: Open
Trade: ST
Created By: Martin Aztiazarain

1

Step 1: Closing A Reviewed / Approved Submittal Item

- Click checkbox to the left of the Submittal Item.
- Click the 'Close' button on the upper right of the screen.

Items (2) Documents (0) Comments (0) Custom Fields (2) Revisions (1)

Group By: None Page 1 of 1 Show 25 per page Send for Review Create Revision

	Item Details	Title	#	Rev #	Spec Section	Sub Section	Category	Status	Held By
<input checked="" type="checkbox"/>		DWG_FAF_EH_1M_ST_00001_0_Level 1M top and bottom	57	0	03 20 00		Shop Drawing	RWC	Laurent Foury
<input type="checkbox"/>		DWG_FAF_EH_1M_ST_00002_0_Level 1M top and bottom	65	0	03 20 00		Shop Drawing	RAR	

Submittal Package Details

Close Package

Are you sure you want to close the submittal package? All open submittal items in the package will be closed.

2

Step 2:

- Click 'Continue' button to confirm the closing of the selected item.

Continue No, Cancel