Preparing Submittals and Starting the Submittal Workflow – Construction Contractor

Submittal Items and Submittal Packages are both accessed from the Submittals form. The submittal registry will be input to Submittal Items as part of the project set up and it is the responsibility of the Construction Contractor to upload submittal documents, prepare the Submittal Packages and start the workflow.

Add/Update Details of the Submittal Item
Manually Create a Submittal Item
Upload the Submittal Documents
Create a Submittal Package
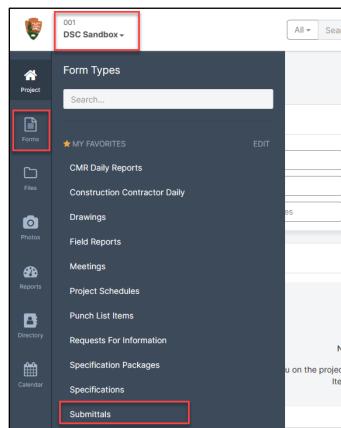Starting the Workflow
Complete the Workflow
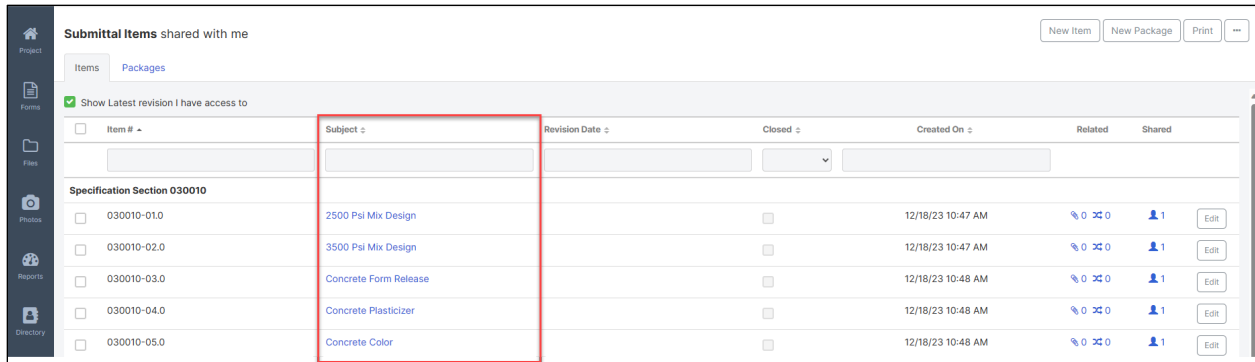Access an Existing Submittal Form
Create a Revision
Reports
Related Resources

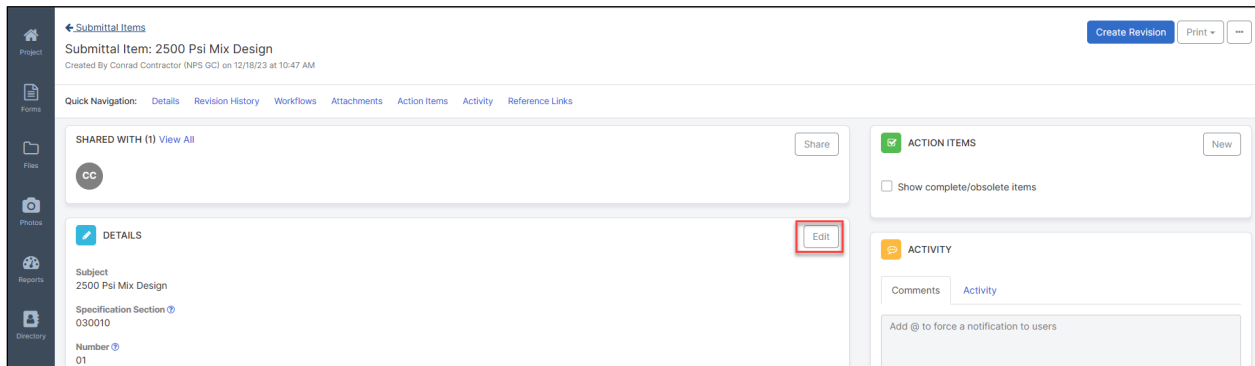**Add/Update Details of the Submittal Item**

1. Open the project.
2. Open **Submittals** from the **Forms** options or from **Favorite Form Types** on the project's home page.

3. Click on the Subject to Open the **Submittal Item** form. (To add a *New* form, see: Manually Create a New Submittal Item.)
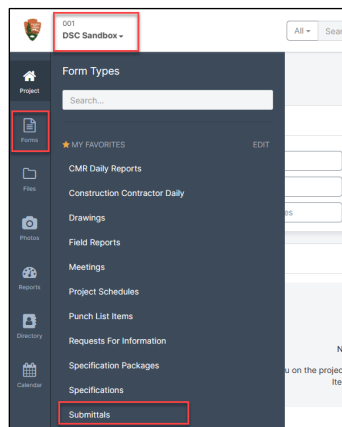
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4. Click **Edit** in the *Details* panel.

5. Add additional information to editable fields.
6. Click the **Save** button.

Manually Create a Submittal Item
Individual Submittal Items can be added as a register item before the item is received or when ready to submit.

1. Open the project.
2. Open **Submittals** from the **Forms** options or from **Favorite Form Types** on the project's home page.

3. Click **New Item** from the top.

4. Fill in all required and applicable fields of the **Submittal Item** form.
5. Click the **Save** button.

Uploading the Submittal Documents

Submittal documents are uploaded to the *Attachments* of the **Submittal Item**. Attachments will be accessible by anyone the form has been Shared with.

1. With the Submittal *Item* open, locate the *Attachments* panel and upload the submittal item.
2. Drag and Drop or Upload submittal document(s). See Adding Attachments to Forms (projectteam.com) for additional help.
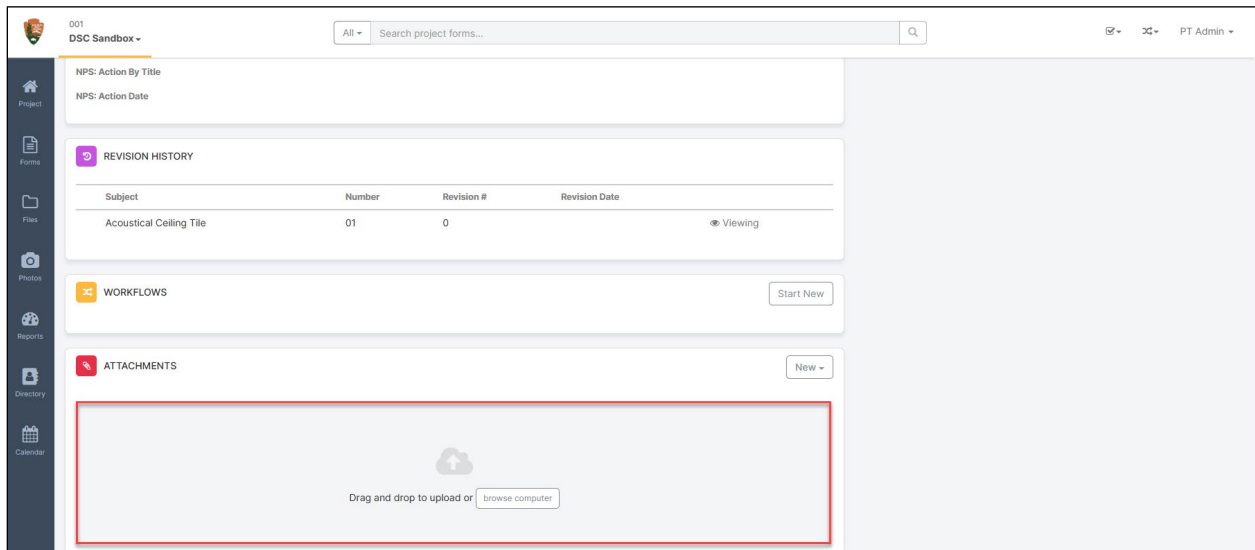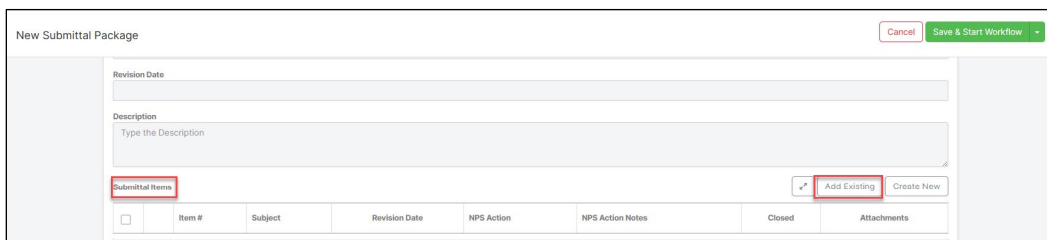

Create a Submittal Package

Submittal Items are grouped together in a Submittal Package for workflow and distribution. Existing Items can be pulled into the Package or new Items can be created on the spot.

1. Open the project.
2. Open **Submittals** from the **Forms** options or from **Favorite Form Types** on the project's home page.
3. Click **New Package** from the top.
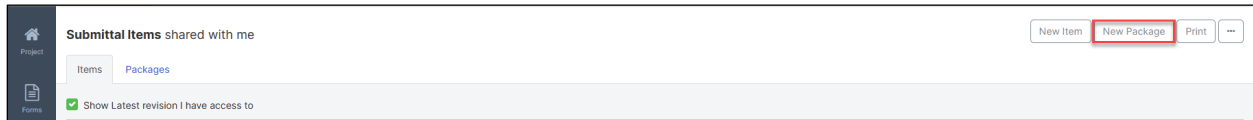
4. Fill in the required and other applicable fields of the *Submittal Package* form.
5. To add existing *Submittal Items* to the package:
    a. Click the **Add Existing** button in the *Submittal Items* collection.

    b. Click the **checkbox** beside the title of each Submittal to add to the package and click the **Add** button.
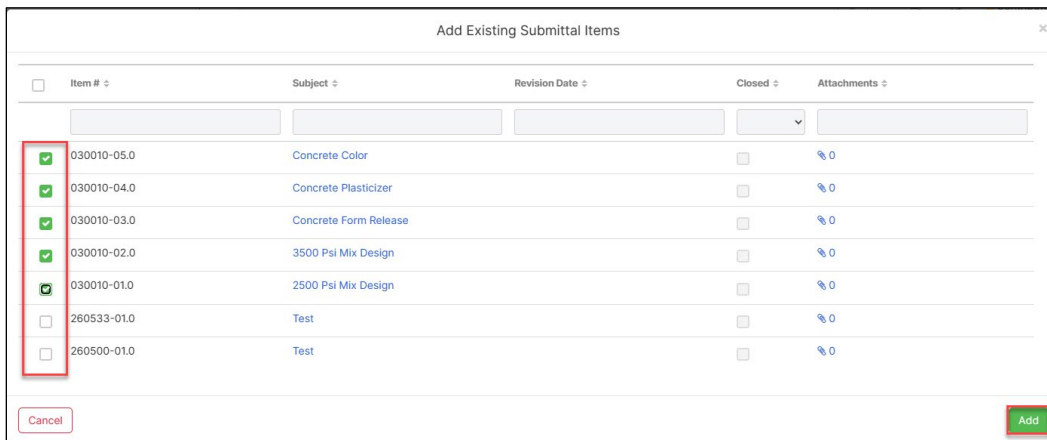
6. If a Submittal Item does not exist in ProjectTeam:
    a. Click the **Create New** button in the *Submittal Items* collection.
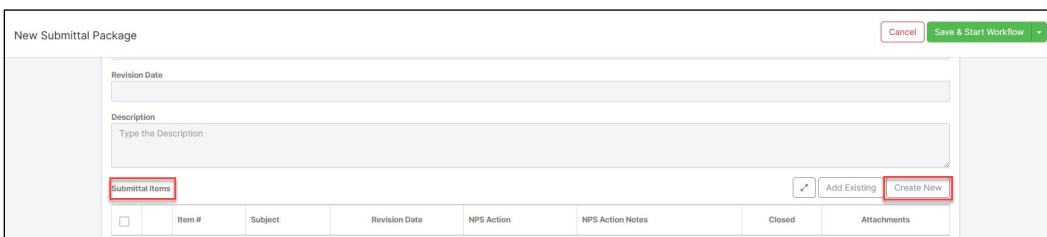
  b. Fill in the Submittal fields and click the **Save** button.

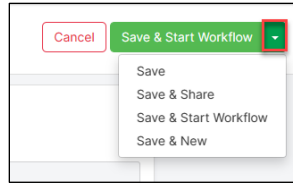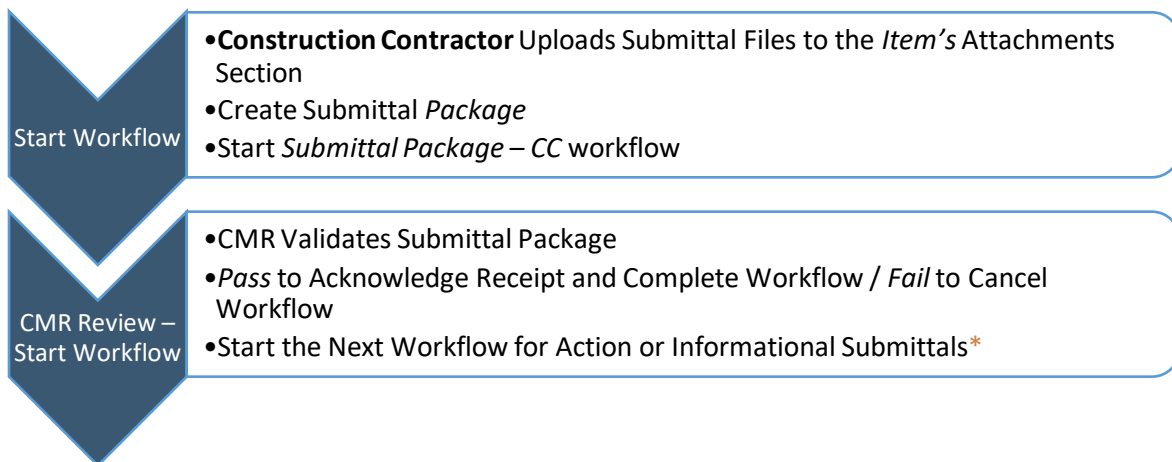7. When you are ready to save the Submittal Package, click the **Save** button. (You also have the option to Share, Start the Workflow or open another New Submittal Package form by clicking on the arrow beside Save & Start Workflow.)
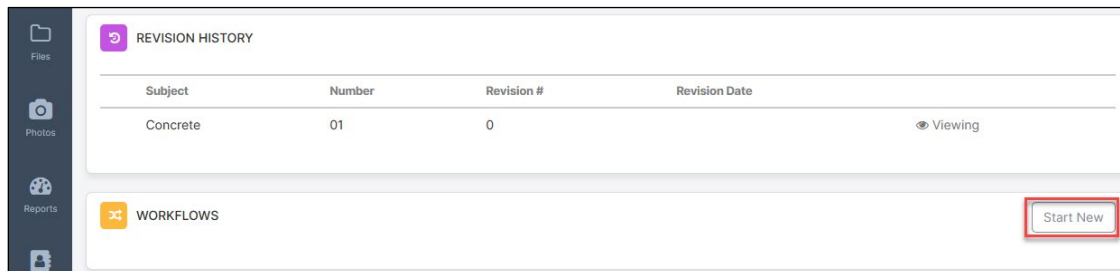
Cancel	Save & Start Workflow ▾
	Save
	Save & Share
	Save & Start Workflow
	Save & New

Starting the Workflow

Once the documents are uploaded to the Item forms and the Items are linked to the Package, you are ready to send the Submittal *Package* through the workflow to the CMR.
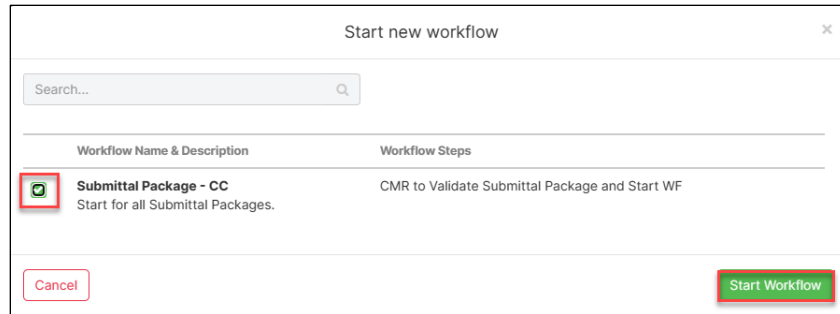
Submittal Package – CC Workflow Diagram

Start Workflow
- **Construction Contractor** Uploads Submittal Files to the *Item's* Attachments Section
- Create Submittal *Package*
- Start *Submittal Package – CC* workflow

CMR Review – Start Workflow
- CMR Validates Submittal Package
- *Pass* to Acknowledge Receipt and Complete Workflow / *Fail* to Cancel Workflow
- Start the Next Workflow for Action or Informational Submittals*

1. Open the **Submittal Package**.
2. Locate the *Workflows* panel and click **Start New**.

	REVISION HISTORY				
Files	**Subject**	**Number**	**Revision #**	**Revision Date**	
Photos	Concrete	01	0		👁 Viewing
Reports	WORKFLOWS				Start New

3. Check the box beside *Submittal Package - CC*.
4. Click **Start Workflow**.

Complete the Workflow

Once the Construction Contractor submits the *Submittal Package – CC* workflow, the CMR will determine the additional workflow necessary for the Package.

The final step of each workflow is for the Construction Contractor to acknowledge receipt. When the NPS COR passes the workflow the Construction Contractor will receive notification with instructions to review for missing information and **Pass** the workflow step to acknowledge receipt and mark the workflow **Complete**.

1. Access the record from the link in the emailed notification or by opening ProjectTeam and navigating to the *Submittal Package*.
2. Open the first *Submittal Item* by clicking on the **Subject** in the **Submittal Items** collection of the *Package*.
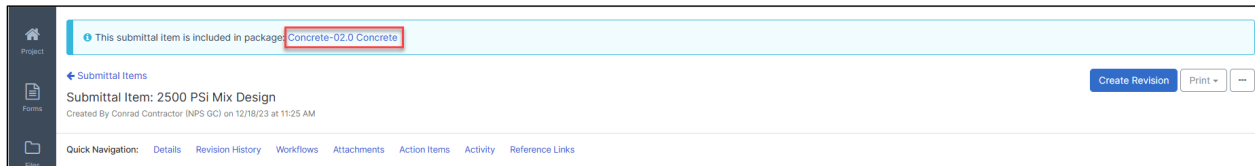

3. Review the *Item* **Detail**, most importantly, the **A/E Action, A/E Review Comments, NPS Review Action and NPS Action Notes**.

4. Review the **Attachments** for additional documents, new versions, and markups added by others.
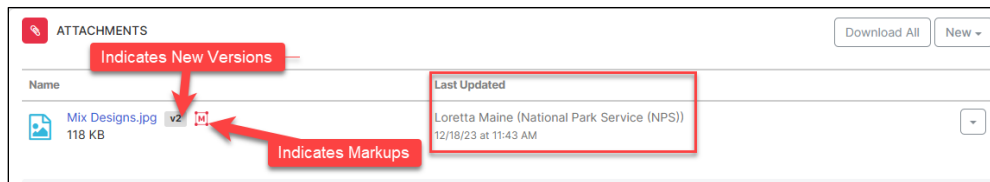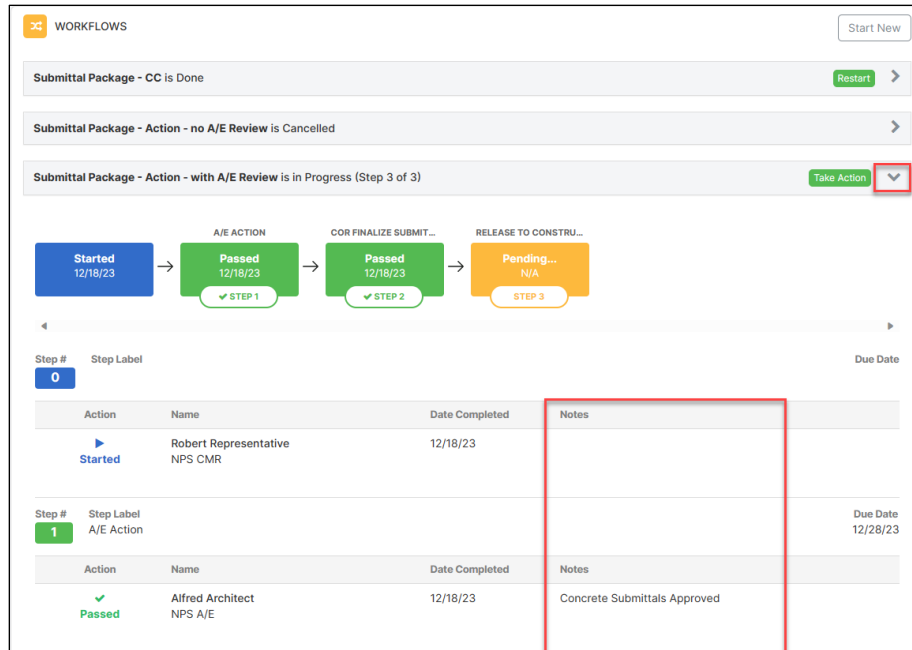

5. Return to the *Package* and repeat steps 2-4 for the additional *Items*.

6. Return to the *Package* and review the *Package* **Details.**
7. Open the **Workflow** to review **Notes**.

8. Click on the green **Take Action** button from the **Workflow** panel or the from the top of the form.
    a. Choose **Pass** to acknowledge receipt of the RFI.
    b. Choose **Fail** to return the workflow to the COR for additional information.
    c. Enter **Notes**.
    d. Click the green **Take Action** button on the bottom of window.

Access an Existing Submittal Form

Once a Submittal Item or Package has been created, it will appear in the corresponding log and can be opened back up to be reviewed or edited and Action Items, Comments, Reference Links, Workflows, or Attachments can be added.

1. Open **Submittals** from the **Forms** options or from **Favorite Form Types** on the project's home page.
2. From the **Items** or **Package** log view, click on the **Subject** of the form to open.
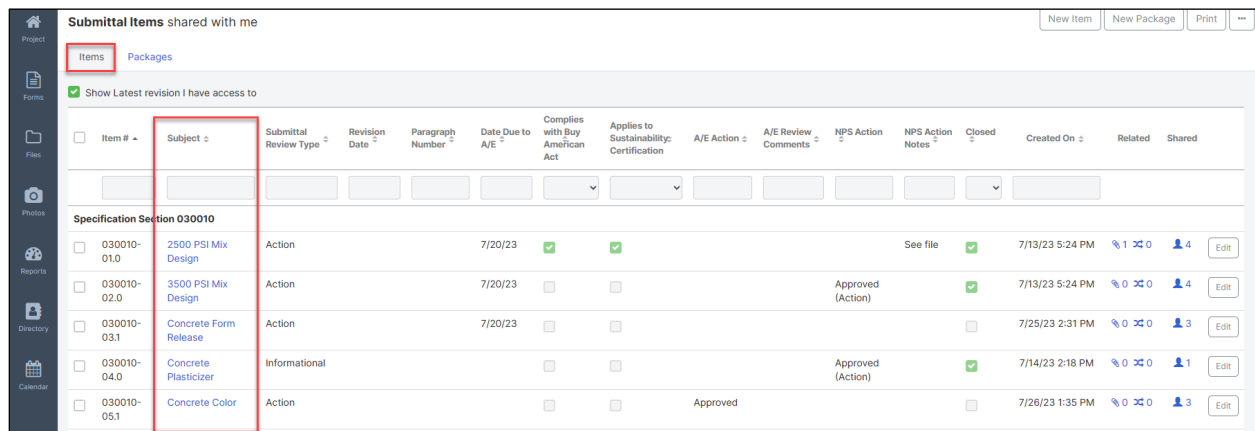
3. From the **Package** log, click on the **Subject** of the *Item* form to open (or **Edit** to directly open the Edit pane for the *Package* details.)
4. Click the **Edit** button in the *Details* section to make changes to the fields.
5. Update the necessary fields.
6. Click the **Save** button.
7. Add any applicable **Action Items**, **Comments**, **Reference Links**, or **Attachments.**

Create a Revision
Revisions should be made to the Submittal Package and not the Item itself. Revising the package will auto-create revisions of any open Submittal Items in that package eliminating the need to revise them individually while preserving the link to the revised Submittal Package.

1. Navigate to the existing **Submittal Package.**
2. On the top of the form, click **Create Revision**.
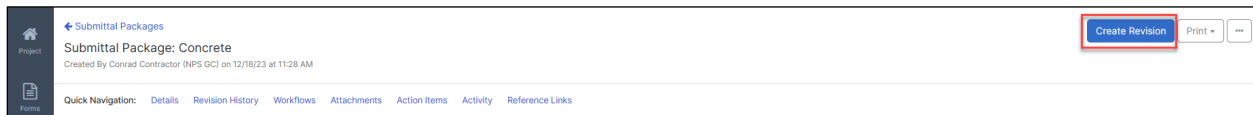
3. Click the yellow *Yes* button in the *New Package Revision?* window that opens.
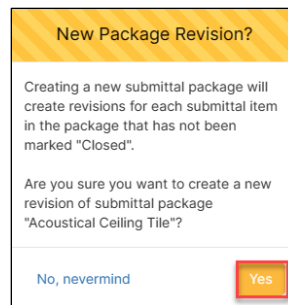
4. The *Package* form opens with the Package's **Revision** number incremented by one. Each *Item* that does NOT have the **Closed** box checked will appear in the **Submittal Items** collection and the **Item #** will be incremented by one; update any other necessary fields in the *Package* form.

5. Click the **Save** button.
6. From the **Submittal Items** collection, click on the first Item's **Subject** to open the form.
7. Upload new Submittal documents to the *Items* form and update any necessary *Items* fields.
8. Repeat Step 7 for each open *Item* in the *Package.*
9. Return to the *Package*.
10. Start the *Package* **Workflow**.

Reports
RFI and Workflow Reports can be run from under **All Users Access** in *Reports*. The report will include only forms that have been shared with you.
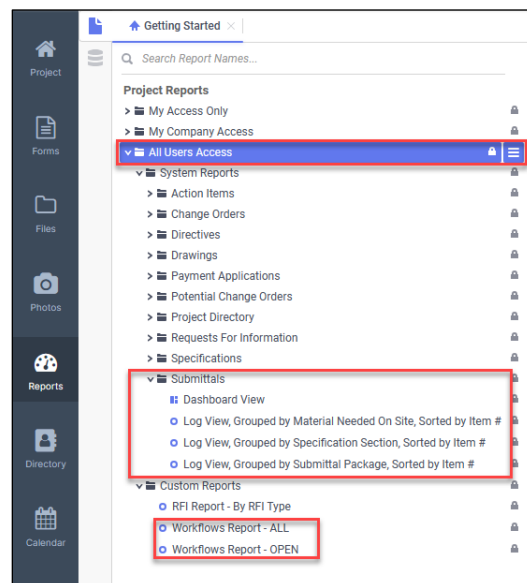
Related Resources

- **Help Center Links**
  - Submittal Item Overview (projectteam.com)

- - Create a Submittal Item (projectteam.com)
  - Create a New Submittal Package (projectteam.com)

- **Quick Reference Guides (QRGs) and Training Videos**
  - **Reviewing Submittals and Starting the Action/Information Workflow - CMR**
  - **Submittal Review and Response – Architect or Engineer**
  - **Submittal Review and Response - COR**
  - Initiating and Completing a Workflow
  - Adding Attachments
  - Creating Action Items
  - Making Comments
  - Adding Reference links
  - Running Reports
  - File Management Overview