



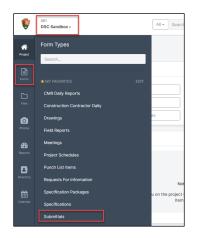
# Preparing Submittals and Starting the Submittal Workflow – Construction Contractor

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: <u>Manually Create</u> <u>a New Submittal Item</u>.)

A Project	Submit	tal Items shared with me				(	New Item New	Package	Print
	Items	Packages							
Forms	Show Latest revision I have access to								
~		Item # 🔺	Subject ¢	Revision Date ¢	Closed ¢	Created On $\protect$	Related	Shared	
Files					~				
Ø	Specific	ation Section 030010							
Photos		030010-01.0	2500 Psi Mix Design			12/18/23 10:47 AM	%0 x⊄0	<b>±</b> 1	Edit
<b>8</b> 20		030010-02.0	3500 Psi Mix Design			12/18/23 10:47 AM	⊗0 <b>&gt;⊄</b> 0	<b>£</b> 1	Edit
Reports		030010-03.0	Concrete Form Release			12/18/23 10:48 AM	%0 <b>&gt;⊄</b> 0	<b>±</b> 1	Edit
8		030010-04.0	Concrete Plasticizer			12/18/23 10:48 AM	<b>%</b> 0 <b>x⊄</b> 0	<b>1</b> 1	Edit
Directory		030010-05.0	Concrete Color	-		12/18/23 10:48 AM	<b>⊗</b> 0 <b>×</b> 0	<b>1</b> 1	Edit

4. Click **Edit** in the *Details* panel.

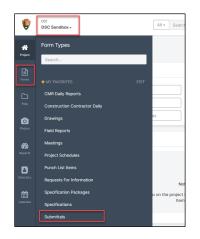
A Project	Submittal Items Submittal Item: 2500 Psi Mix Design Created By Conrad Contractor (NPS GC) on 12/18/23 at 10:47 AM		l	Create Revision Print -
Forms	Quick Navigation: Details Revision History Workflows Attachments Action Items Activity Reference Links			
b	SHARED WITH (1) View All	re	ACTION ITEMS	New
Files	<b>60</b>		Show complete/obsolete items	
Ó				
	details	lit		
Reports	Subject 2500 Psi Mix Design		Comments Activity	
Directory	Specification 3 Section 7 030010		Add @ to force a notification to users	
Directory	Number 🕐 01			

- 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.

V	001 DSC Sandbox -	All   Search project forms	Q	⊗ • x • PT Admin •
Project	Submittal Items shared with me Items Packages			New Item New Package Print

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

New Submittal Iter	m	Cancel	Save & Share 👻
	Z DETAILS		
	Subject		
	Structural Steel Shop Drawings		
	Submittal Review Type		
	Specification Section 10	* Required	
	Number 🕅	* Required	
	Type the Number		

#### 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 <u>Adding Attachments to Forms</u> (projectteam.com) for additional help.

Ş	001 DSC Sandbox -	All - Search pro	ject forms			Q	¥*	xc, ► PT Adn	nin +
Roject	NPS: Action By Title NPS: Action Date								
Forms	P REVISION HISTORY								
C	Subject	Number	Revision #	Revision Date					
Files	Acoustical Ceiling Tile	01	0		Viewing				
Ø									
Photos	WORKFLOWS				Start New				
Reports									
-	ATTACHMENTS				New -				
Directory									
Calendar									
		Drag and drop to	upload or browse compute	er					
	L								

## 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.

A Project	Submittal Items shared with me	New Item New Package Print
	Items Packages	
Forms	Show Latest revision I have access to	

- 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.

New Submittal Pa	I Package Cancel Save										
	Revision Date										
	Description Type the Description										
	Submittal Items	]					~	Add Existing Create New			
		Item #	Subject	Revision Date	NPS Action	NPS Action Notes	Closed	Attachments			

b. Click the **checkbox** beside the title of each Submittal to add to the package and click the **Add** button.

Item # \$	Subject ¢	Revision Date \$	Closed \$	Attachments ¢
030010-05.0	Concrete Color			<b>%</b> 0
030010-04.0	Concrete Plasticizer			80
030010-03.0	Concrete Form Release			80
030010-02.0	3500 Psi Mix Design			80
030010-01.0	2500 Psi Mix Design			<b>%</b> 0
260533-01.0	Test			<b>⊗</b> 0
260500-01.0	Test			<b>%</b> 0

- 6. If a Submittal Item does not exist in ProjectTeam:
  - a. Click the **Create New** button in the *Submittal Items* collection.

New Submittal Pa	ackage					Cancel Save	& Start Workflow 👻		
	Revision Date								
	Description Type the Description								
	Submittal Items					Add Existing Create New			
	Item # Subject	ect Revision Date	NPS Action	NPS Action Notes	Closed	Attachments			

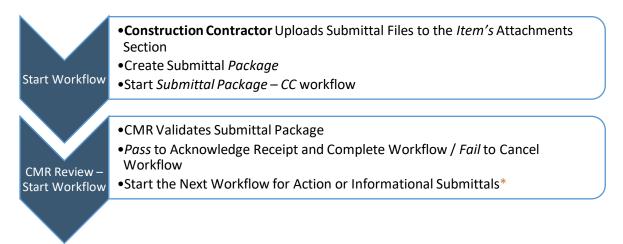
- b. Fill in the Submittal fields and click the Save button.
- 7. When you are ready to save the Submittal Package, click the **Save** button. (You also have the option to Share, Start the Workflow or open another New Submittal Package form by clicking on the arrow beside Save & Start Workflow.)

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



# 1. Open the Submittal Package.

2. Locate the *Workflows* panel and click **Start New**.

25			55 (BURNE) 40		
	Subject	Number	Revision #	Revision Date	
tos	Concrete	01	0		Viewing
6					
orts	WORKFLOWS				Start Nev

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

		Sta	art new workflow	×
Searc	ch	Q		
	Workflow Name & Description		Workflow Steps	
٥	Submittal Package - CC Start for all Submittal Packages.		CMR to Validate Submittal Package and Start WF	
Canc	el			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*.

				Edit
Subject				
Concrete				
Subcontractor/Supplier				
Specification Section (2) Concrete				
Number				
02				
Revision				
0				
Revision Date				
Description				
Description Submittal Items				×*
	Subject	Revision Date	Closed	د پر Attachments
Submittal Items	Subject Concrete Color	Revision Date	Closed	
Submittal Items Item #		Revision Date		Attachments
Submittal Items Item # Concrete-06.0	Concrete Color	Revision Date		Attachments
Submittal Items Item # Concrete-06.0 Concrete-05.0	Concrete Color Concrete Plasticizer	Revision Date		Attachments

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

✔ DETAILS		Edit
Subject 2500 PSi Mix Design		
Submittal Review Type Action		
Specification Section ⑦ Concrete		
Conforms to Contract Documents Yes		
Proposed Contract Deviation (?)		
A/E Action Approved		
A/E Review Comments Approved As Submitted		
NPS Review Action		
NPS Action Notes		
Closed		
-		

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

S ATTACHMENTS		Download All New -
Indicates New Versions		
Name	Last Updated	
Mix Designs.jpg vz II 118 KB	Loretta Maine (National Park Service (NPS)) 12/18/23 at 11:43 AM	•
indicates Markups		

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

A Project	This submittal item is included in package Concrete
Forms	♦ Submittal Items       Submittal Item:     Create Revision     Print *     =       Submittal Item:     2500 PSI Mix Design     Create Bay Consid Contractor INPS OCI on 12/18/23 at 1125 AM
Files	Quick Navigation: Details Revision History Workflows Attachments Action Items Activity Reference Links

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

× wo	RKFLOWS				Start New				
Submit	tal Package - C	C is Done			Restart				
Submit	Submittal Package - Action - no A/E Review is Cancelled								
Submit	tal Package - A	ction - with A/E Review is in Pr	ogress (Step 3 of 3)		Take Action				
	Started       Ale Action       Cor Finalize SUBMIT       Release to constru         Started       Passed       Passed       Passed         12/18/23 $\rightarrow$ Passed       N/A         v Step 1       v Step 2       Step 3								
Step #	Step Label				Due Date				
	Action	Name	Date Completed	Notes					
	► Started	Robert Representative NPS CMR	12/18/23						
Step #	Step Label A/E Action				Due Date 12/28/23				
	Action	Name	Date Completed	Notes					
	✓ Passed	Alfred Architect NPS A/E	12/18/23	Concrete Submittals Approved					

- 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.

A	Sub	mittal Iten	ns shared with me	)											New Item	New Pack	age Pri	int
Project	Ite	ems Packa	ages															
Forms	🖬 s	Show Latest re	vision I have access to															
Files		ltem# 🔺	Subject ¢	Submittal Review Type <sup>‡</sup>	Revision Date <sup>≑</sup>	Paragraph Number <sup>♀</sup>	Date Due to A/E	Complies with Buy American Act	Applies to Sustainability: Certification	A/E Action ¢	A/E Review Comments <sup>‡</sup>	$\mathop{\hbox{\rm NPS}}_{\hat{\varphi}} {\rm Action}$	NPS Action Notes	Closed ≎	Created On $\Leftrightarrow$	Related	Shared	
Ø								~	~					~				
Photos	Spe	cification Se	tion 030010															
Reports		030010- 01.0	2500 PSI Mix Design	Action			7/20/23						See file		7/13/23 5:24 PM	<b>%1 x</b> ⊄0	<b>1</b> 4	Edit
		030010- 02.0	3500 PSI Mix Design	Action			7/20/23					Approved (Action)			7/13/23 5:24 PM	<b>⊗0 ≭</b> 0	<b>1</b> 4	Edit
Directory		030010- 03.1	Concrete Form Release	Action			7/20/23								7/25/23 2:31 PM	<b>%0 x</b> ¢0	<b>1</b> 3	Edit
Calendar		030010- 04.0	Concrete Plasticizer	Informational								Approved (Action)			7/14/23 2:18 PM	<b>%0 ≭</b> 0	<b>1</b> 1	Edit
		030010- 05.1	Concrete Color	Action						Approved					7/26/23 1:35 PM	<b>%0 ≭</b> 0	<b>1</b> 3	Edit

- 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 <u>Submittal Package</u> 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.



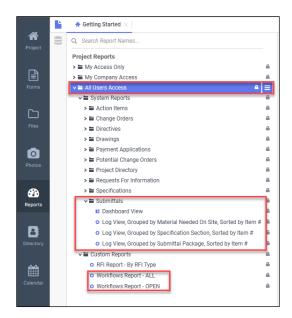
4. The *Package* form opens with the Package's **Revision** number incremented by one. Each *Item* that does NOT have the **Closed** box checked will appear in the **Submittal Items** collection and the **Item #** will be incremented by one; update any other necessary fields in the *Package* form.

New Submittal Pa	ackage Revision				Cancel Save	& Start Workflow 👻			
	DETAILS								
	Subject								
	Concrete								
	Subcontractor/Supplier								
	Specification Section 🔊								
	Concrete				×				
	Number								
	02								
	Revision								
	1								
	Revision Date								
	Description								
	Type the Description								
	Submittal Rems Add Existing Create New								
	item #	Subject	Revision Date	Closed	Attachments				
	Concrete-05.1	Concrete Plasticizer			<b>%</b> 0				

- 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
  - o <u>Submittal Item Overview (projectteam.com)</u>

- o <u>Create a Submittal Item (projectteam.com)</u>
- o Create a New Submittal Package (projectteam.com)
- Quick Reference Guides (QRGs) and Training Videos
  - **o** Reviewing Submittals and Starting the Action/Information Workflow CMR
  - Submittal Review and Response Architect or Engineer
  - Submittal Review and Response COR
  - o Initiating and Completing a Workflow
  - Adding Attachments
  - o Creating Action Items
  - Making Comments
  - Adding Reference links
  - Running Reports
  - File Management Overview