



Reviewing Submittals and Starting the Action/Information Workflow - CMR

When the *Submittal Package – CC* workflow is started by the Construction Contractor the CMR is assigned the first step and will receive an email notification with a link to the record. The workflow step requires the CMR to validate Submittal Items for accuracy, completeness, and compliance with contract requirements and start the next workflow based on the type of submittal.

Submittal Items

[Review Details](#)

[Review, Markup, and Upload Attachments](#)

[Start the Action or Information Workflow](#)

[Action – No A/E Review Workflow Steps](#)

[Action – A/E Review Workflow Steps](#)

[Information Only Workflow Steps](#)

[Complete the Submittal Package – CC Workflow](#)

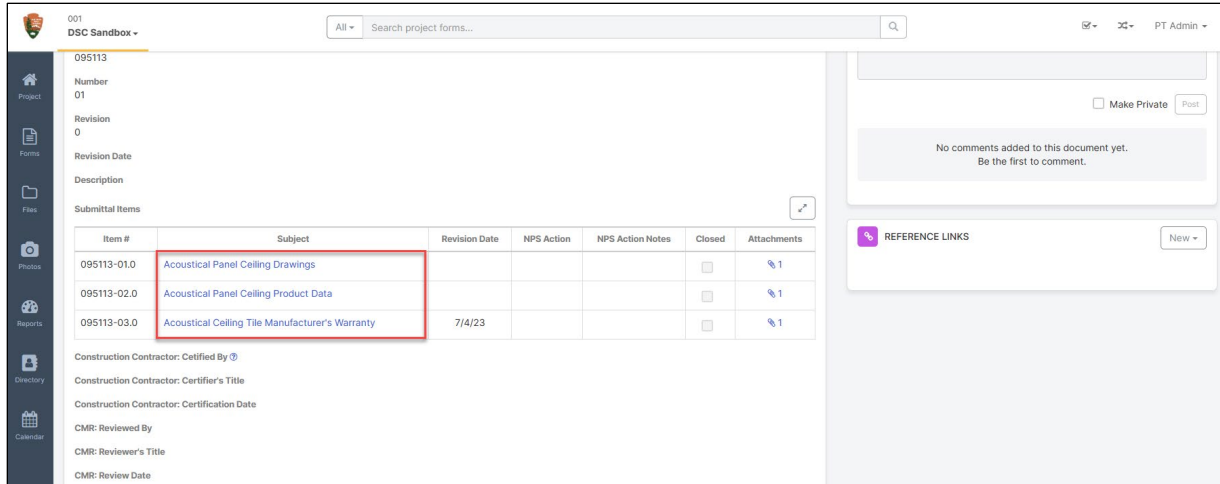
[Accessing Existing Submittals](#)

[Reports](#)

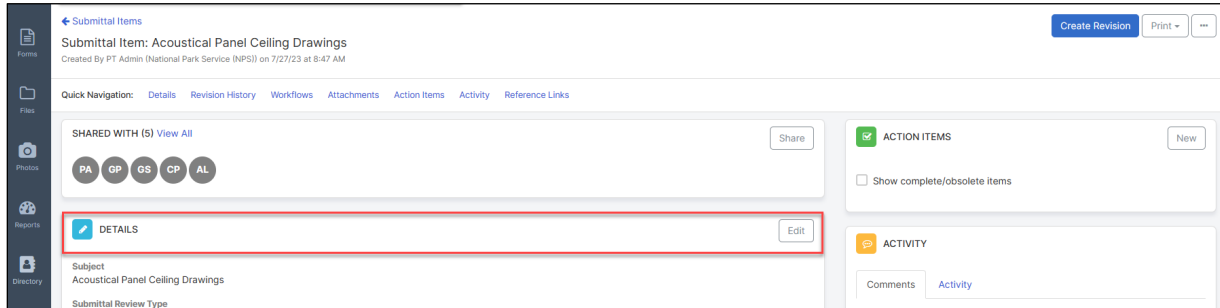
[Related Resources](#)

Submittal Items: Review Details

1. Access the record by clicking **View Document and Take Action** from the Submittal Package – CC Workflow email notification (or by opening ProjectTeam and navigating to the record.)
2. Open the first *Submittal Item* in the *Package*.



3. Review the *Details* and click **Edit** to make and changes or add *Notes*.



4. **Save** the *Items* form.

Submittal Items: Review, Markup, and Upload Attachments

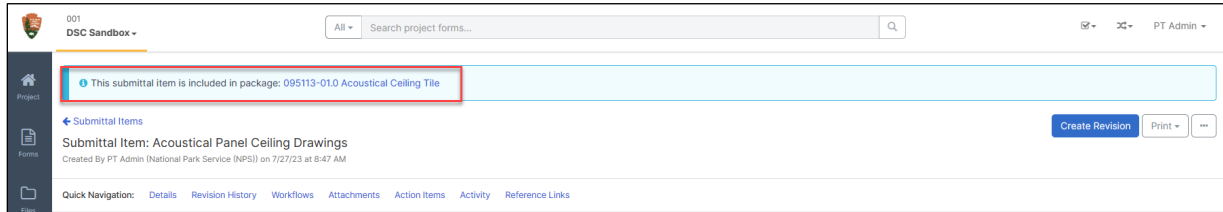
5. With the *Item* still open, scroll down to the **Attachments** panel.
6. Review and Markup the **Attachments**. See [Add markup annotations to a file \(projectteam.com\)](https://projectteam.com)



7. Upload any additional attachments.
8. Repeat **Steps 3-7** for each *Item* in the *Package*.

Submittal Packages: Edit Details

9. Return to the *Package* by clicking the link at the top of the *Item* record.



10. Click **Edit** on the *Details* panel to make changes and add NPS review fields.



11. Review the *Details* and update fields as necessary.

12. Complete the applicable **CMR: Review** fields.



13. **Save** the form.

Submittal Packages: Start the Action or Information Workflow

The CMR will start the second workflow to send it through the appropriate steps. There are three workflow options: *Action – No A/E Review*, *Action – Review*, and *Information Only*.

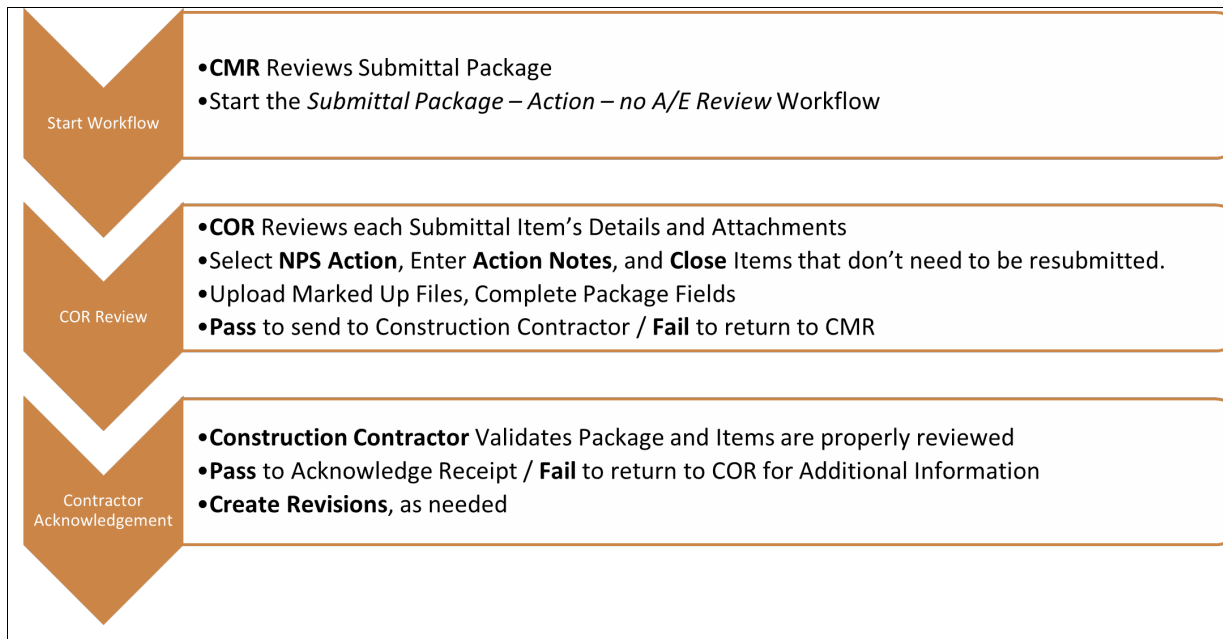
14. Navigate to the **Workflow** panel of the *Package*.

15. Click **Start New**.

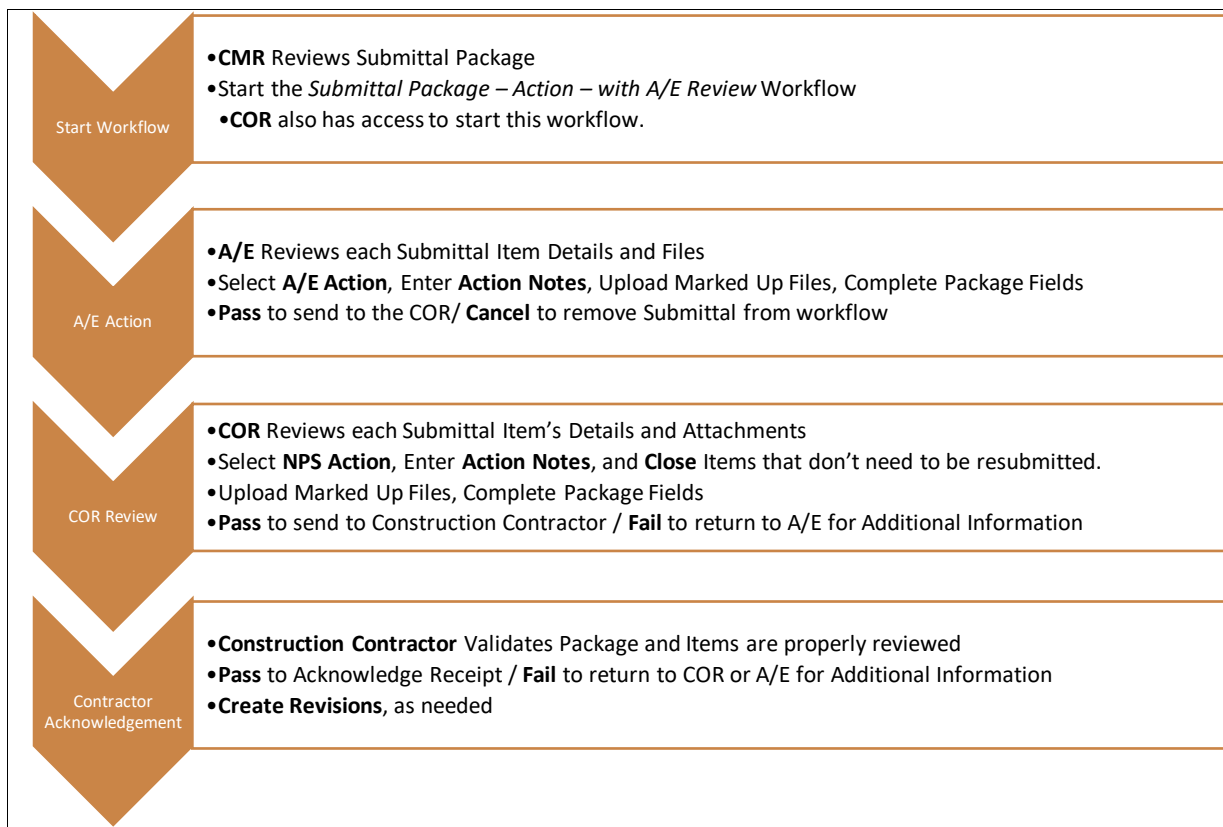


16. Determine which workflow is relevant for the submittal.

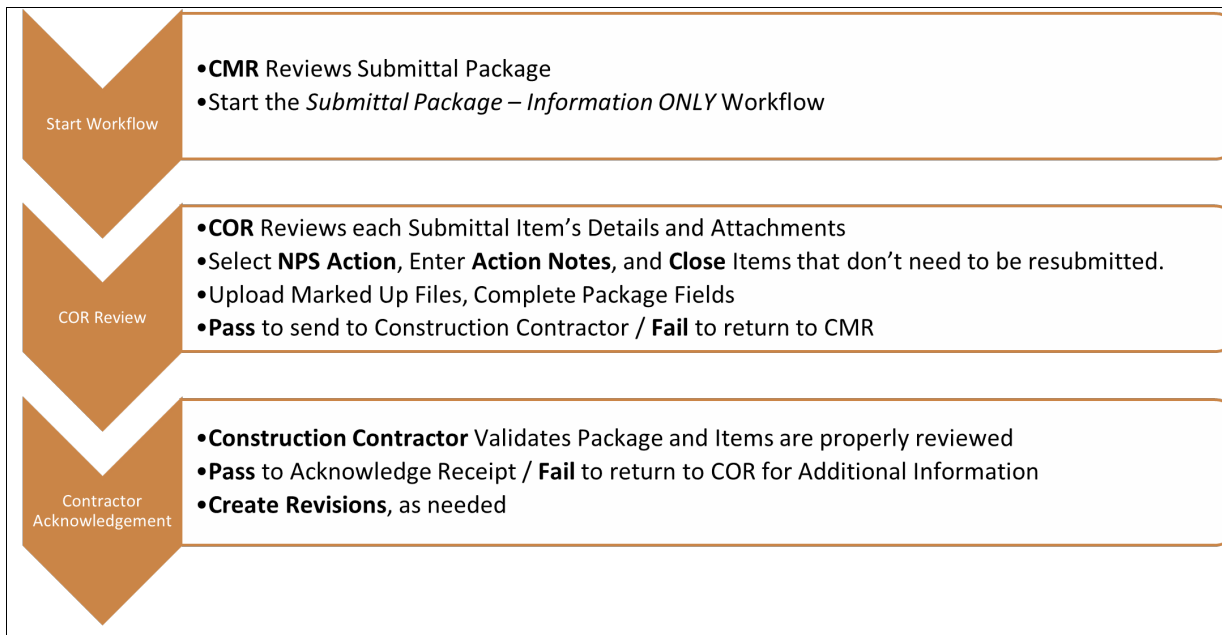
ACTION – NO A/E REVIEW Workflow



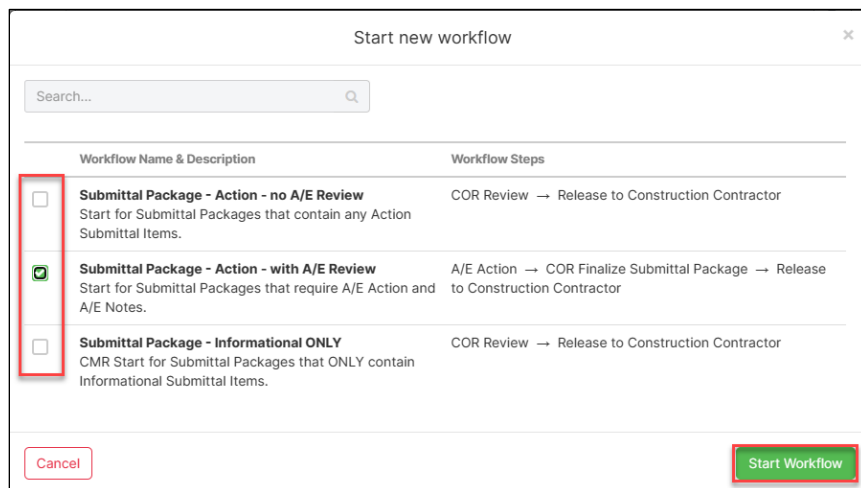
ACTION – A/E REVIEW Workflow



INFORMATION ONLY Workflow



17. Check the box beside the applicable **Workflow Name** and **Start Workflow**.



Complete the Submittal Package – CC Workflow

After starting the Action/Item Workflow, the CMR must complete the *Submittal Package – CC workflow* that was initially submitted by the Construction Contractor.

18. Click on the green **Take Action** button from the top or in the *Workflows* section of the record.

19. Choose **Pass** or **Cancel**

- a. **Pass** marks the workflow **Complete**.
- b. **Cancel** notifies the Construction Contractor and ends the workflow. It can be restarted by the Construction Contractor.

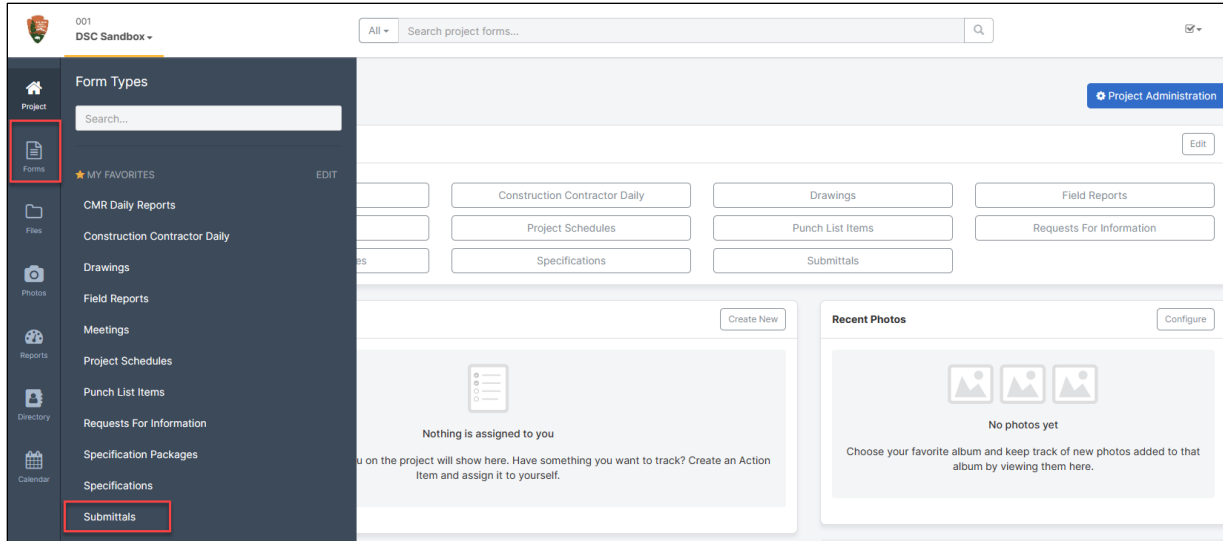
20. Enter **Notes**, as necessary. If you are cancelling the workflow step, enter the reason in the **Notes** field.

21. Click the green **Take Action** on the bottom of window.

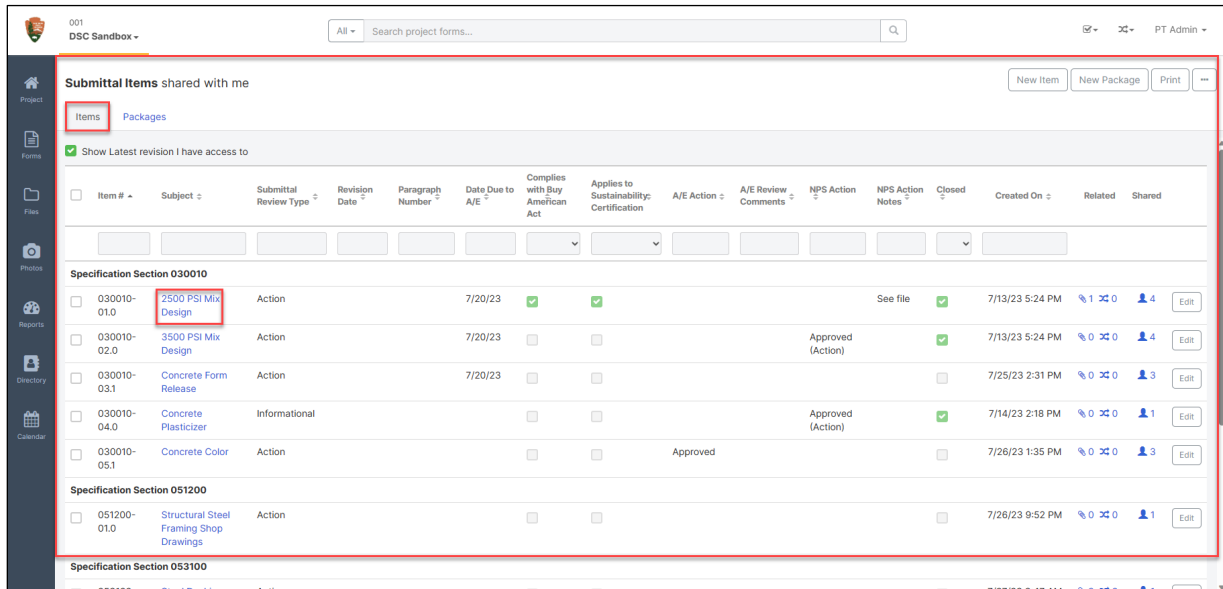
Accessing Existing Submittals

Once a form is Shared with you or you have been assigned a step in the form's workflow, you will be able to see it in the Submittals log and can open it to review, Edit the Details or add Action Items, Comments, Reference Links, Workflows, or Attachments.

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

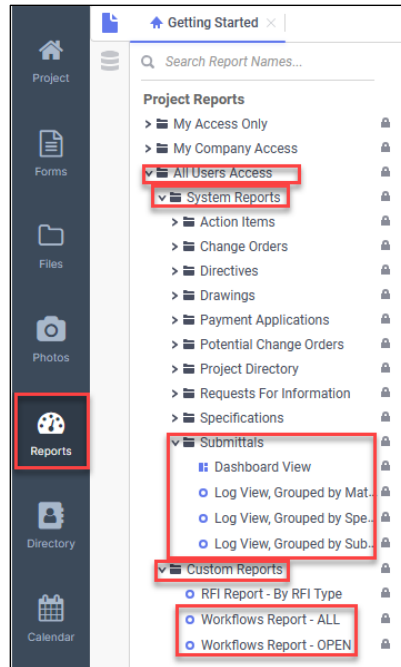


2. From the **Items** or **Packages** log view, click on the **Subject** of the Submittal to open the record.



Reports

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



Related Resources

- **Help Center Links**
 - [Submittal Item Overview \(projectteam.com\)](https://projectteam.com)
 - [Create a Submittal Item \(projectteam.com\)](https://projectteam.com)
 - [Create a New Submittal Package \(projectteam.com\)](https://projectteam.com)

- **Quick Reference Guides (QRGs) and Training Videos**
 - **Preparing Submittals and Starting the Submittal Workflow – Construction Contractor**
 - **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