



Submittal Review and Response– Architect or Engineer

When the CMR starts the **Action – A/E Review** Workflow, the A/E will receive an email notification. The workflow step instructs the A/E to validate each Submittal Item, select A/E Action and enter Action Notes, upload revised/marked up files, fill out A/E related fields on the Package, and Pass workflow to route to COR.

Submittal Items

- [Review and Edit the Action fields](#)
- [Review, Markup, and Upload Attachments](#)

Submittal Packages

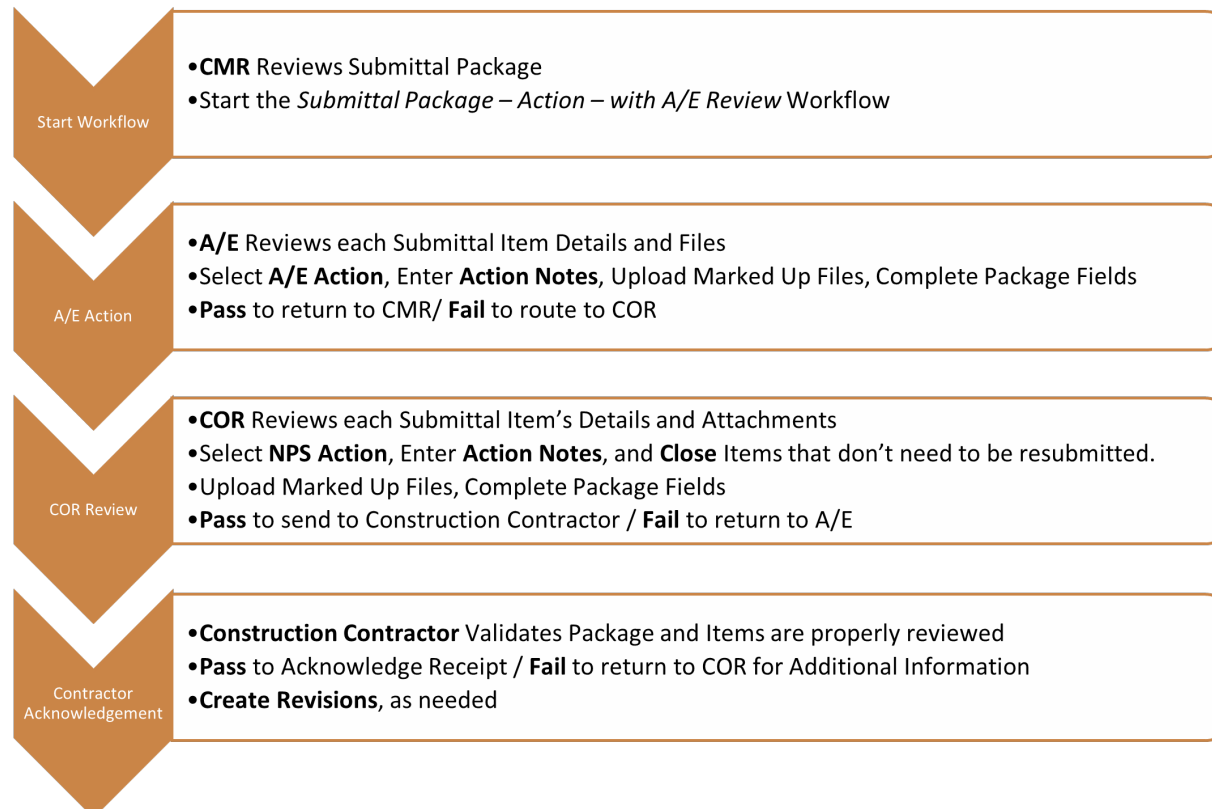
- [Edit A/E Fields](#)
- [Pass/Cancel the Workflow Step](#)

[Accessing Existing Submittals](#)

[Reports](#)

[Related Resources](#)

ACTION – A/E REVIEW Workflow



Submittal Items: Review and Edit the Action Fields

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

001 DSC Sandbox

095113

Number: 01

Revision: 0

Revision Date:

Description:

Submittal Items

Item #	Subject	Revision Date	NPS Action	NPS Action Notes	Closed	Attachments
095113-01.0	Acoustical Panel Ceiling Drawings				<input type="checkbox"/>	1
095113-02.0	Acoustical Panel Ceiling Product Data				<input type="checkbox"/>	1
095113-03.0	Acoustical Ceiling Tile Manufacturer's Warranty	7/4/23			<input type="checkbox"/>	1

Construction Contractor: Certified By

Construction Contractor: Certifier's Title

Construction Contractor: Certification Date

CMR: Reviewed By

CMR: Reviewer's Title

CMR: Review Date

REFERENCE LINKS

3. Verify the information in the *Details* panel.
4. Click **Edit** to open the *Item* form.

Submittal Items

Submittal Item: Acoustical Panel Ceiling Drawings

Created By PT Admin (National Park Service (NPS)) on 7/27/23 at 8:47 AM

Quick Navigation: Details Revision History Workflows Attachments Action Items Activity Reference Links

SHARED WITH (5) View All

PA GP GS CP AL

DETAILS

Subject: Acoustical Panel Ceiling Drawings

Submittal Review Type

ACTION ITEMS

ACTIVITY

Comments Activity

5. Complete the **A/E Action** and **A/E Review Comments** fields.
6. **Save** the *Item* form.

Edit Submittal Item Cancel Save

Submission Phase (QC/QA Inspection)

Description
Type the Description

Complies with Buy American Act

Applies to Sustainability Certification

Conforms to Contract Documents
Yes

Proposed Contract Deviation

A/E Action

A/E Review Comments
Type the A/E Review Comments

Closed

Submittal Items: Review, Markup and Upload Attachments

- With the *Item* still open, scroll down to the **Attachments** panel.

ATTACHMENTS Download All New

Name	Last Updated
095113 - Acoustical Panel Drawings.pdf 181 KB	PT Admin (National Park Service (NPS)) 7/27/23 at 11:52 AM

- Review and Markup the **Attachments** for each Item. See [Add markup annotations to a file \(projectteam.com\)](https://projectteam.com)
- Upload any new versions or additional attachments. See the Attachments video or QRG for help.

Submittal Packages: Edit A/E Fields

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

001 DSC Sandbox - All Search project forms... PT Admin

This submittal item is included in package: 095113-01.0 Acoustical Ceiling Tile

Submittal Items Create Revision Print ...

Submittal Item: Acoustical Panel Ceiling Drawings
Created By PT Admin (National Park Service (NPS)) on 7/27/23 at 8:47 AM

Quick Navigation: [Details](#) [Revision History](#) [Workflows](#) [Attachments](#) [Action Items](#) [Activity](#) [Reference Links](#)

- Click **Edit** on the *Details* panel.

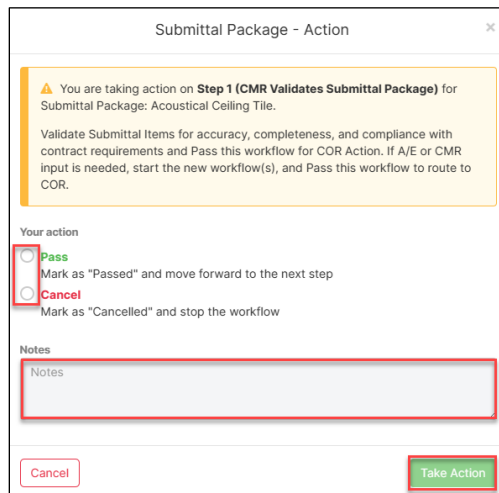
DETAILS Edit

- a. Review the *Details* and update fields as necessary.
- 12. Complete the **Architect/Engineer Review** fields.
- 13. **Save** the *Package* form.



Submittal Packages: Pass or Cancel the Workflow Step

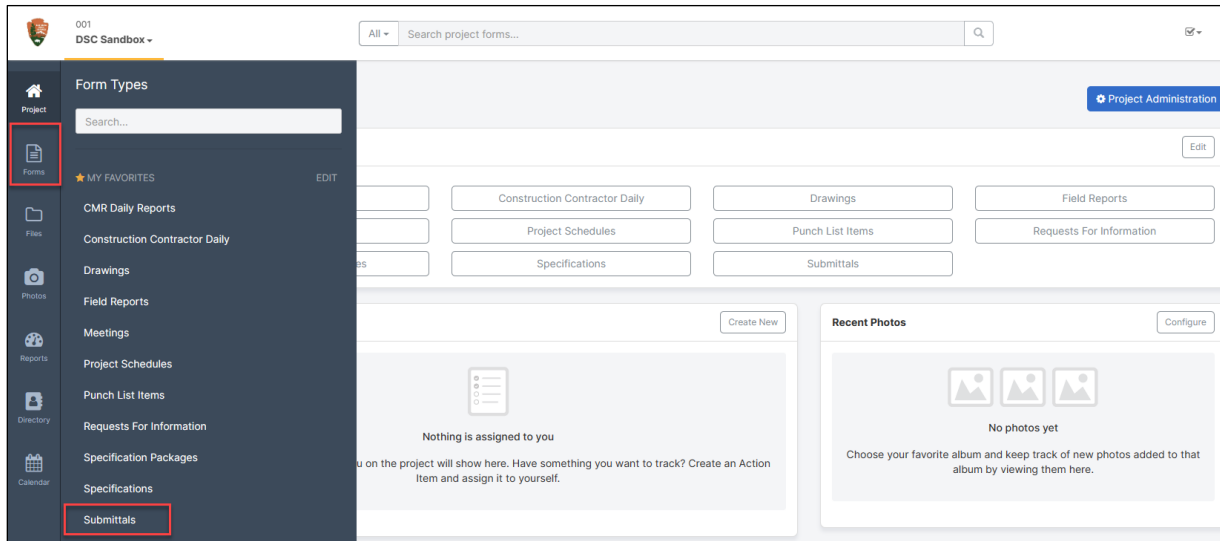
- 14. With the *Package* open, click **Take Action** from the green box at the top or from the *Workflow* panel under the *Details*.
- 15. Verify that you have completed the steps in the Instructions.
- 16. Choose **Pass** or **Cancel**.
 - a. **Pass** moves the workflow on to the COR for their validation and response before returning to the Construction Contractor.
 - b. **Cancel** cancels the workflow and notifies the CMR. The CMR is able to re-start the workflow.
- 17. Enter **Notes**, as necessary. If you are cancelling the workflow step, enter the reason in the **Notes** field.
- 18. Click the green **Take Action** on the bottom of window.



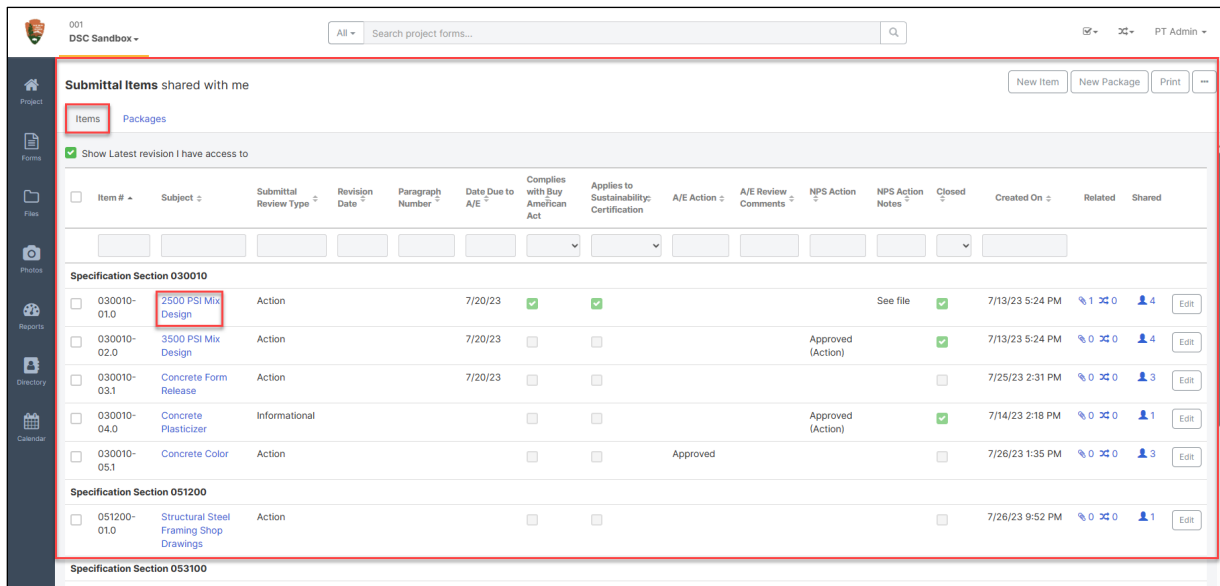
Accessing Existing Submittals

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.

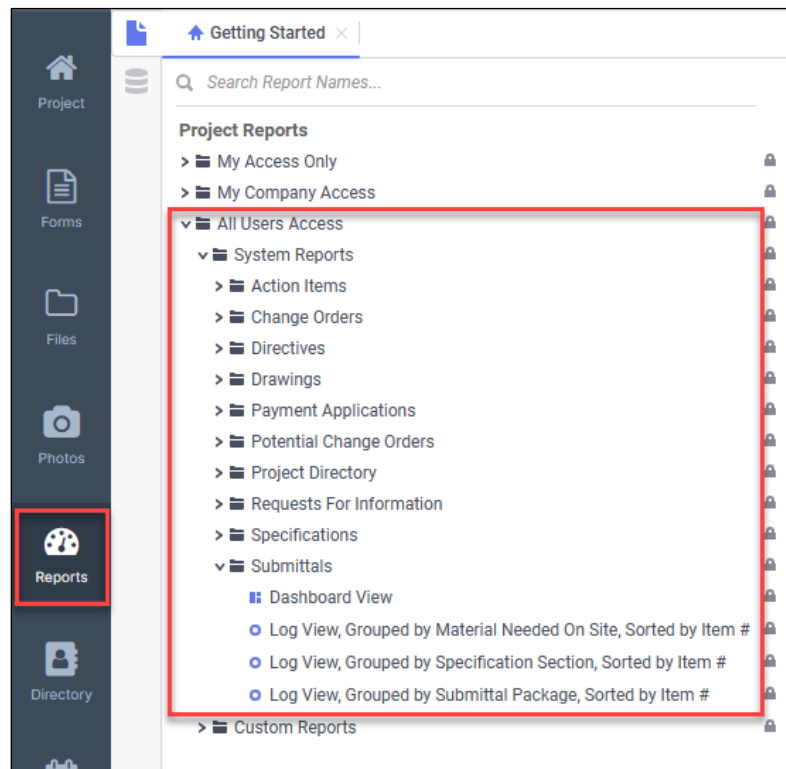


2. From the *Items* or *Packages* log view, click on the **Subject** of the Submittal to open the record.



Reports

Submittal Reports can be run from under **All Users Access/System Reports/Submittals** 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**
 - **Reviewing Submittals and Starting the Action/Information Workflow - CMR**
 - **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