

Submittal e-Builder Process Guide

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Submittal Settings Setup – Close Out Coordinator

The Submittal and Pre Closeout Process (SPCP) needs to be initiated before starting submittal review. Please reach out to the OSU PM if the SPCP has not been initiated.

The following fields in the Submittal Settings will be set up by the OSU Close Out Coordinator at the completion of the SPCP.

1. Update the “Complete Review Date Due Offset” and “Offset Type” to match the contract
2. Set the “Specify Default Folder For Attachments” to “Documents \ 40 Construction \ 03 Submittals
3. Assign the Submittal Coordinator
4. Update the Auto Numbering Packages field if necessary
5. Update the Honor Auto-Close Status field if necessary
6. Keep all other settings as the default value
7. Ensure stakeholders identified in SPCP are added to the project

The Submittal and Pre Closeout Process (SPCP) needs to be initiated before starting submittal review. Please reach out to the OSU PM if the SPCP has not been initiated.





The following fields in the Submittal Settings will be set up by the Close Out Coordinator at the completion of the SPCP.

1. Update the “Complete Review Date Due Offset” and “Offset Type” to match the contract
2. Set the “Specify Default Folder For Attachments” to “Documents \ 40 Construction \ 03 Submittals
3. Assign the Submittal Coordinator
4. Update the Auto Numbering Packages field if necessary
5. Update the Honor Auto-Close Status field if necessary
6. Keep all other settings as their default value
7. Ensure stakeholders identified in SPCP are added to the project

Identifying Submittals Requiring Stakeholder Involvement – PM

1. Submittals that need to be reviewed by stakeholders are identified by the PM in the excel submittal log spreadsheet at the start of construction via the **Submittal and Pre-closeout Process (SPCP)**:

Once the excel submittal log spreadsheet is imported, submittal items requiring stakeholder review will have a “?” icon displayed next to the title. By hovering on the “?” icon, the full description ““Require OSU PM/Stakeholder Review -” listing stakeholder names at the end will show up.

			Package #	Spec Section	Sub Section	Category	Status
	Require OSU PM/Stakeholder review - Stakeholder Name(s)						
<input type="checkbox"/>	2    Item Demo - Create Item and & Attach File	2	0	01 00 00 - GENERAL REQUIREMENTS		Product Data	NEW

Importing Submittal Log – GC/DB/CM

1. In the Submittal Packages page, click “Create Package” and create a package with the package name matching the names in the excel submittal log spreadsheet.

Create Submittal Package

Details

Project	*Amy Hwang - Sandbox OSEP Audit
Project Number	OSU-190102
Submittal Package #	1 - <input type="text"/> - 0
* Submittal Package Name	<input type="text"/>
Description	<input type="text"/>
Trade	<input type="text"/>

Custom Fields

There are no custom fields for this submittal package.

2. In the Submittal Register page (the default page), click “Import.”

Submittal Register for HIDDEN PROJECTS

Filter Submittal Items

Search In: <input checked="" type="radio"/> All <input type="radio"/> Pending my review Title: <input type="text"/> Status: <input type="text" value="Please select a status..."/> Number: <input type="text"/> Revision: <input type="text"/> Submittal Package #: <input type="text"/> - <input type="text"/> - Rev: <input type="text"/> Responsible Sub/Manufacturer: <input type="text"/> Custom Field 1: <input type="text" value="Please select a custom field..."/> <input type="text"/> Custom Field 2: <input type="text" value="Please select a custom field..."/> <input type="text"/>	Item Status: <input checked="" type="checkbox"/> Open <input type="checkbox"/> Closed <input checked="" type="checkbox"/> Draft <input type="checkbox"/> Overdue Description: <input type="text"/> Category: <input type="text" value="Please select a category..."/> Priority: <input type="text" value="Please select..."/> Spec Section: <input type="text"/> Sub Section: <input type="text"/> Submittal Coordinator: <input type="text" value="Please select..."/> Reviewer: <input type="text"/>
--	---

Group By: Page: of 2 Show: per page

3. Select the excel spreadsheet by clicking on “Choose File.” Select the file from the pop up window, then click “Next.”

Choose your Import File

* Import File: No file chosen

Note: Please select a .xls or .xlsx file to import.

4. If you are using the OSU template, click “Next.” If you are using your own excel template, remap the columns by clicking on the drop downs list in each field.

Submittal Item Built-In Fields

* Title: <input type="text" value="Submittal Title"/>	* Category: <input type="text" value="Category"/>
Description: <input type="text" value="Description"/>	Priority: <input type="text" value="Priority"/>
Package Number: <input type="text" value=""/>	Package Name: <input type="text" value="Package Name"/>
* Spec Section: <input type="text" value="Spec Section"/>	Sub Section: <input type="text" value="Sub Section"/>
Responsible Manufacturer/Sub-Contractor: <input type="text" value="Responsible Manufacturer/Sub-Contractor"/>	Commitment: <input type="text" value=""/>
Date Due From Sub: <input type="text" value=""/>	Date Received From Sub: <input type="text" value=""/>
Date Due Submit For Review: <input type="text" value=""/>	Date Due Review Complete: <input type="text" value=""/>
Date Due Return: <input type="text" value=""/>	Date Returned: <input type="text" value=""/>
Date Due Delivery: <input type="text" value=""/>	Date Delivered: <input type="text" value=""/>

Custom Fields

Building/Location:

5. Ensure the sample in the “Preview” tab looks good, and the “Rows With Exceptions” field is zero. Click “Import.” If the “Rows With Exceptions” field is not zero, click on the “Exceptions” tab to see the errors, update the excel file and click “Previous” until you can re-choose “Import File.”

Import File Summary

File Name: Copy of Submittal Register Template - OSU-190066.xlsx	Rows In File: 20
Rows To Be Imported: 20	Rows With Exceptions: 0

Preview (Row 2)

6. Click “Finish” in the next page.

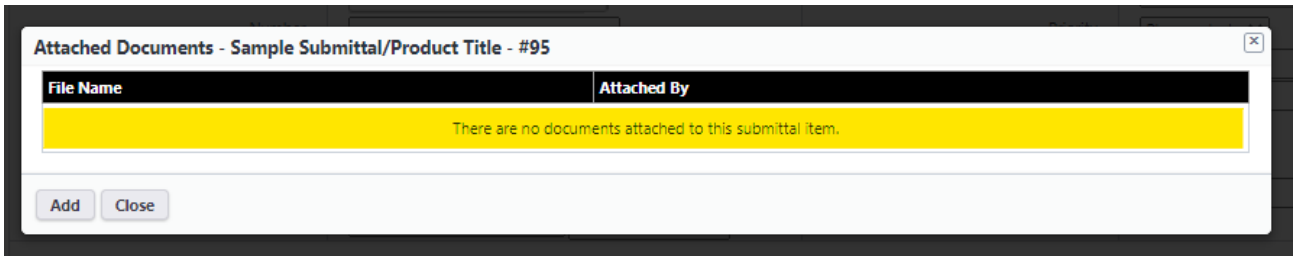
Attaching Files To Submittal Items – GC/DB/CM

Once the submittal register has been set up, upload the submittal files/documents to the submittal line items.

1. Go to the Submittal Register page. Click the paper clip icon.

Item Details	Title	#	Rev #	Package #	Spec Section	Sub Section	Category	Status	Submittal Coordinator	Held By	Reviewers
<input type="checkbox"/>	Sample Submittal/Product Title	95	0	25-Approved-0	XX XX XX - SPEC SECTION TITLE		Product Data	NEW			

2. In the popup window, drag and drop the submittal file into the box (make sure the tip of your mouse is within the area highlighted in yellow).



3. Click "Select."
 - a. Do NOT click on any of the folders, the correct folder is already setup as default.
4. Click "Done."
5. Click "Close."

Sending Submittal Out For Review – GC/DB/CM

1. In the Submittal Register page (the default page), click on the Package #. This will take you to the Submittal Package Details page. If the submittal item has not been added to a package, select the submittal item(s) via the checkbox and click on "Add to Package."

Item Details	Title	#	Rev #	Package #	Spec Section	Sub Section	Category	Status	Submittal Coordinator	Held By	Reviewers
<input type="checkbox"/>	Demo Submittal Item	3	0	23-0	08 71 00 - DOOR HARDWARE		Product Data	NEW		Amy Hwang	

2. In the Submittal Package details page, select the submittal item(s) via the checkbox and click "Send for Review."

Item Details	Title	#	Rev #	Spec Section	Sub Section	Category	Status	Submittal Coordinator	Held By	Reviewers
<input checked="" type="checkbox"/>	Demo Submittal Item	3	0	08 71 00 - DOOR HARDWARE		Product Data	NEW		Amy Hwang	

3. Click "Send for Review" in the pop-up window. If there are multiple submittal coordinators in the project, select the appropriate Submittal Coordinator before clicking "Send for Review."

Forwarding Submittal for Stakeholder Review – A/E or AOR

Once the A/E or AOR receives the submittal, forward the submittal to stakeholders.

Submittal items requiring stakeholder review will have a “?” icon displayed next to the title. By hovering on the “?” icon, the full description ““Require OSU PM/Stakeholder Review -” listing stakeholder names at the end will show up.

1. In the Submittal Register (the default page) check the checkbox of the item and click “Forward for Review.”

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"/>	Item Demo - Review and Comment	8	0	6-0	01 00 00 - GENERAL REQUIREMENTS		Product Data	NEW	Amy Hwang	Amy Hwang	Reviewers

2. In the Forward for Review pop up window, select the stakeholder in the “Forward To” field and click the arrow. In the Send Type, select “Action Required” and add a “Respond By” date. Click “Forward for Review”

*If the user is not in the “Forward To” list, select the OSU PM.

Forward For Review

Forward for Review | Cancel

Project: *Amy Hwang - EB Submittal & Close Out Demo
 Project Number: EUT-205000

*** Forward To**

- *Test, AE (OSU)
- *Test, AssistantVP (OSU)
- *Test, AssociateVP (OSU)
- *Test, AUA (OSU)
- *Test, Client (OSU)
- *Test, CloseoutCoordinator (OSU)**
- *Test, CMR (OSU)
- *Test, Consultant (OSU)
- *Test, ContractAdmin (OSU)
- *Test, ContractCompliance (OSU)

and/or Enter external user (email)

Type to search...

Lookup

Send Type

Action Required ?

Notify Only

*** Respond By**

Forwarding Submittal for External Consultant Review – AE or AOR

1. In the Submittal Register (the default page) check the checkbox of the item and click “Forward for Review.”

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"/>	Item Demo - Review and Comment	8	0	6-0	01 00 00 - GENERAL REQUIREMENTS		Product Data	NEW	Amy Hwang	Amy Hwang	Reviewers

- In the Forward for Review pop up window, type in the email address of the external consultant in the “and/or Enter external user (email)” field, then click the orange “add XXX@Company.com” pop-up.

Forward For Review

Forward for Review Cancel

Project Project Number * Forward To	*Close Out Coordinator - Submittal & Close Out Demo/Template EUT-205000
	<div style="display: flex; align-items: flex-start;"> <div style="border: 1px solid #ccc; padding: 5px; width: 60%; margin-right: 10px;"> *Test, AE (OSU) *Test, AssistantVP (OSU) *Test, AssociateVP (OSU) *Test, AUA (OSU) *Test, Client (OSU) *Test, CloseoutCoordinator (OSU) *Test, CMR (OSU) *Test, Consultant (OSU) *Test, ContractAdmin (OSU) *Test, ContractCompliance (OSU) </div> <div style="display: flex; flex-direction: column; align-items: center; margin-right: 10px;"> ➤ ➤ </div> <div style="border: 1px solid #ccc; width: 35%; height: 100px;"></div> </div>
	and/or Enter external user (email) <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> XXX@Company.com </div> <div style="background-color: #ffcc00; padding: 2px 5px; display: inline-block; font-size: small;"> Add XXX@Company.com... </div>

- In the Send Type select “Action Required” and add a “Respond By” date. Then click “Forward for Review.”

Forward For Review

Forward for Review Cancel

Project Project Number * Forward To	*Close Out Coordinator - Submittal & Close Out Demo/Template EUT-205000
	<div style="display: flex; align-items: flex-start;"> <div style="border: 1px solid #ccc; padding: 5px; width: 60%; margin-right: 10px;"> *Test, AE (OSU) *Test, AssistantVP (OSU) *Test, AssociateVP (OSU) *Test, AUA (OSU) *Test, Client (OSU) *Test, CloseoutCoordinator (OSU) *Test, CMR (OSU) *Test, Consultant (OSU) *Test, ContractAdmin (OSU) *Test, ContractCompliance (OSU) </div> <div style="display: flex; flex-direction: column; align-items: center; margin-right: 10px;"> ➤ ➤ </div> <div style="border: 1px solid #ccc; width: 35%; height: 100px;"></div> </div>
	and/or Enter external user (email) <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <XXX@Company.com> x </div> <div style="margin-bottom: 5px;"> Lookup </div>
Send Type * Respond By	<div style="margin-bottom: 5px;"> <input checked="" type="radio"/> Action Required ? </div> <div style="margin-bottom: 5px;"> <input type="radio"/> Notify Only ? </div> <div style="background-color: #ffcc00; padding: 2px 5px; display: inline-block; font-size: x-small;"> </div> <div style="font-size: x-small; color: #00aaff;"> 📅 </div>

Reviewing Submittal and Adding Comments – Stakeholders

1. Access the submittal by clicking on the link in the notification email (you must log into e-Builder first). Skip to Step 03.

Or

Log into e-Builder, click on the submittal title under the “Submittal items in your court.” Skip to Step 03.

Submittal items in your court Filter by Actions: Forwarded and No Response Show: First fifty

Project	Title	#	Rev #	Package #	Status	Due Date	Held By
*Amy Hwang - EB Submittal & Close Out Demo	Item Demo - Review - Revise Resubmit	10	1	8-1	NEW	03.20.2020	Amy Hwang

Or

Log into e-Builder, select the project and click “Submittals” under the Project Menu on the left. In the Submittal Register (the default page) filter the item by selecting “Pending my review” click “Filter.”

*If no submittal shows, check to ensure “Open” is checked in “Item Status” field.

Filter Submittal Items

Search In: All Pending my review

Title:

Status:

Number:

Revision:

Submittal Package #: - - Rev

Responsible Sub/Manufacturer:

Custom Field 1:

Custom Field 2:

Item Status: Open Closed Draft Overdue

Description:

Category:

Priority:

Spec Section:

Sub Section:

Submittal Coordinator:

Reviewer:

[Clear](#) [Filter](#)

2. Access the submittal by clicking on the submittal title or the number.

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 type="checkbox"/>	Item Demo - Review and Comment	8	0	6-0	01 00 00 - GENERAL REQUIREMENTS		Product Data	NEW	Amy Hwang	Amy Hwang	Reviewers

3. Once in the Submittal Item Details page, select the pdf file(s) in the “Documents” tab and click “Download.” Review and add comments in the pdf file(s).

Documents (2) Comments (2) Custom Fields (1) Revisions (0) Attached Viewpoints (0)

Show Thumbnails [Download](#) [Attach](#) [Remove](#) [Bluebeam Studio](#)

File Name	Attached By	Date Attached	Attached To
Submittal 03a - Demo Review and Comment.pdf Version (1) <small>Properties Download Redline Stamp Attach Revision Remove</small>	Hwang, Amy	02.24.20 08:39PM	

4. If you do not have any comments, skip this step, and go to Step 05.

If you added comments in the PDF file(s), upload the commented pdf file(s) by clicking on the “Comments” tab and click “Add Comment.”

Documents (2) **Comments (3)** Custom Fields (1) Revisions (0)

Comments [Add Comment](#)

In the pop-up window, type in a general description in the “Comment” field, then drag and drop the file(s) to File field.

Add Comment

Save Check Spelling Cancel

Submittal Item: Item Demo - Sent for Review
Comment: See attached for comments

File Name Attached By

Drag and drop files here to upload, or browse.

Attach

The “Select Destination Folder” field should be pre-populated; if not, select “Documents\40 Construction\30 Submittals” then click “Finish.”

Upload Documents

Finish Cancel

* Select Destination Folder: Documents \ 40 Construction \ 03 Submittals; (Change Folder)

Documents

project_closeout_standards.pdf Remove

Description:

Browse

Description ⓘ

Click “Save.” **** Be sure to click “Finish” before clicking “Save”, or the comment file will not be uploaded.**

Add Comment

Save Check Spelling Cancel

Submittal Item: Item Demo - Sent for Review
Comment: See attached for comments

- Once the review is complete, click “Review Complete” in the Submittal Item Details page in the pop-up window.

Submittal Item Details

Submittal Item Overview Date Details

Review Complete Cancel

Project:	*Amy Hwang - EB Submittal & Close Out Demo	Project Number:	EUT-205000
Title:	Item Demo - Forward For Review	Status:	APP - Approved

Reviewing and Commenting on Submittals – A/E or AOR

1. Access the submittal by clicking on the link in the notification email (you must log into e-Builder first). Skip to Step 03.

Or

Log into e-Builder. In the “Home” tab, click on the submittal title under the “Submittal items in your court.” Skip to Step 03.

Submittal items in your court Filter by Actions: Forwarded and No Response Show: First fifty

Project	Title	#	Rev #	Package #	Status	Due Date	Held By
*Amy Hwang - EB Submittal & Close Out Demo	Item Demo - Review - Revise Resubmit	10	1	8-1	NEW	03.20.2020	Amy Hwang

Or

Log into e-Builder, select the project and click “Submittals” in the Project Menu on the left. In the Submittal Register (the default page) filter the item by selecting “Pending my review” click “Filter.”

*If no submittal shows, check to ensure “Open” is checked in “Item Status” field.

Filter Submittal Items

Search In: All Pending my review

Title:

Status:

Number:

Revision:

Submittal Package #: - - Rev

Responsible Sub/Manufacturer:

Custom Field 1:

Custom Field 2:

Item Status: Open Closed Draft Overdue

Description:

Category:

Priority:

Spec Section:

Sub Section:

Submittal Coordinator:

Reviewer:

2. Access the submittal by clicking on the submittal title or the number.

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 type="checkbox"/>	Item Demo - Review and Comment	8	0	6-0	01 00 00 - GENERAL REQUIREMENTS		Product Data	NEW	Amy Hwang	Amy Hwang	Reviewers

3. Once in the Submittal Item Details page, select the pdf file(s) in the “Documents” tab and click “Download.” Review and add stamps and comments in the pdf file(s).

Documents (2) Comments (2) Custom Fields (1) Revisions (0) Attached Viewpoints (0)

Show Thumbnails

File Name	Attached By	Date Attached	Attached To
Submittal 03a - Demo Review and Comment.pdf Version (1) <small>Properties Download Redline Stamp Attach Revision Remove</small>	Hwang, Amy	02.24.20 08:39PM	

4. If there are stakeholder comments, download the stakeholder commented PDF file, review, and import stakeholder comments into the A/E commented PDF file. Skip this step and go to Step 06 if there are no stakeholder comments.

5. Remove the stakeholder commented PDF file to avoid duplication.

File Name	Attached By	Date Attached	Attached To
Submittal 03b - Demo-Forward for Review.pdf Version (2) <small>Properties Download Redline Stamp Attach Revision Remove</small>	User, External	02.24.20 09:26PM	<input type="button" value="Comment"/>

6. Drag and drop the PDF file with the AE stamp/comment anywhere in the Documents tab.



7. Click “Select.”
 - a. Do NOT click on any of the folders, the correct folder is already setup as the default.
8. Click “Done.”
9. Click “Close.”
10. Return submittals following the steps in the “Return Submittal to Contractor” section below.

Updating Submittal Status – A/E or AOR

1. Access the submittal by clicking on the link in the notification email (you must log into e-Builder first).

Or

Log into e-Builder. In the “Home” tab, click on the submittal title under the “Submittal items in your court.”

Submittal items in your court Filter by Actions: Forwarded and No Response Show: First fifty

Project	Title	#	Rev #	Package #	Status	Due Date	Held By
*Amy Hwang - EB Submittal & Close Out Demo	Item Demo - Review - Revise Resubmit	10	1	8-1	NEW	03.20.2020	Amy Hwang

Or

Log into e-Builder, select the project and click “Submittals” in the Project Menu on the left. In the Submittal Register (the default page), filter the item by selecting “Pending my review” and click “Filter.”

*If no submittal shows, check to ensure “Open” is checked in “Item Status” field.

Filter Submittal Items

Search In: All Pending my review

Title:

Status:

Number:

Revision:

Submittal Package #: - - Rev

Responsible Sub/Manufacturer:

Custom Field 1:

Custom Field 2:

Item Status: Open Closed Draft Overdue

Description:

Category:

Priority:

Spec Section:

Sub Section:

Submittal Coordinator:

Reviewer:

Clear Filter

- In the next page (Submittal Package Detail page), select the submittal item via the check box and click “Update Status” to update the statuses for all submittal items selected in bulk (or you can use the drop down list in each of the submittal items).

*The Revise & Resubmit (RAR), Rejected (REJ) and On hold (ONH) statuses leave the submittal open and allow the DB/CM/GC team to add new files and re-submit.

Item Details	Title	#	Rev #	Spec Section	Sub Section	Category	Status	Submittal Coordinator	Held By	Reviewers
<input checked="" type="checkbox"/>	Demo Submittal Item	75	0	28 46 00 - FIRE DETECTION AND ALARM		Product Data	Approved	Amy Hwang	Amy Hwang	Reviewers

Returning Submittal to Contractor – A/E or AOR

- Access the Submittal Package Details page.

Log into e-Builder. In the “Home” tab, click on the submittal package under the “Submittal items in your court.”

Project	Title	#	Rev #	Package #	Status	Due Date	Held By
*Amy Hwang - EB Submittal & Close Out Demo	Item Demo - Review - Revise Resubmit	10	1	8-1	NEW	03.20.2020	Amy Hwang

Or

Log into e-Builder. Select the project and click “Submittals” in the Project Menu on the left. In the Submittal Register (the default page) filter the item by selecting “Pending my review” and click “Filter.”

*If no submittal shows, check to ensure “Open” is checked in “Item Status” field.

Click on the submittal package number.

Item Details	Title	#	Rev #	Package #	Spec Section	Sub Section	Category	Status	Submittal Coordinator	Held By	Reviewers
<input type="checkbox"/>	Demo Submittal Item	75	0	22-0	28 46 00 - FIRE DETECTION AND ALARM		Product Data	Approved	Amy Hwang	Amy Hwang	Reviewers

- In the Submittal Package Detail page, click on the check box to select the submittal items then click on “Send to Contractor” to return the items to the construction team/close the submittal process.

Item Details	Title	#	Rev #	Spec Section	Sub Section	Category	Status	Submittal Coordinator	Held By	Reviewers
<input checked="" type="checkbox"/>	Demo Submittal Item	75	0	28 46 00 - FIRE DETECTION AND ALARM		Product Data	Approved	Amy Hwang	Amy Hwang	Reviewers

Resubmitting REJ or Revising RAR Submittals – GC/DB/CM

**** Do NOT click on the “Create Revision” button in the Submittal Package Details page.**

1. In the Submittal Register page (the default page), click on the paper clip.

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

<input type="checkbox"/>	Item Details	Title	#	Rev #	Package #	Spec Section	Sub Section	Category	Status	Submittal Coordinator	Held By	Reviewers
<input type="checkbox"/>		Demo Submittal Item	75	0	22-0	28 46 00 - FIRE DETECTION AND ALARM		Product Data	RAR		Amy Hwang	Reviewers

2. Remove any submittal files that no longer apply. (i.e., Keep the previous submittal file for partial resubmittal. Remove the previous submittal file for full resubmittals.) Files removed will be greyed out.

Drag and drop the updated/new submittal file.

Attached Documents - Demo Submittal Item - #75 ✕

<input type="checkbox"/>	File Name	Attached By
<input type="checkbox"/>	Cert of Equip Demo - Demo Detail - OSU-200044.pdf (version 1) Properties Download (56.1KB) Redline Stamp Remove	Hwang, Amy

3. Click on the Package # to get to the Submittal Package Details page.

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

<input type="checkbox"/>	Item Details	Title	#	Rev #	Package #	Spec Section	Sub Section	Category	Status	Submittal Coordinator	Held By	Reviewers
<input type="checkbox"/>		Demo Submittal Item	75	0	22-0	28 46 00 - FIRE DETECTION AND ALARM		Product Data	RAR		Amy Hwang	Reviewers

4. In the Submittal Package Details page, check the checkbox, and click “Send for Review.”

Items (2) Documents (0) Comments (0) Custom Fields (0) Revisions (0) Attached Viewpoints (0)

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

1 item(s) selected

<input type="checkbox"/>	Item Details	Title	#	Rev #	Spec Section	Sub Section	Category	Status	Submittal Coordinator	Held By	Reviewers
<input checked="" type="checkbox"/>		Demo Submittal Item	75	0	28 46 00 - FIRE DETECTION AND ALARM		Product Data	RAR		Amy Hwang	Reviewers

Updating Closed Submittals – GC/DB/CM & A/E or AOR

Updating / deleting closed submittals requires both the GC/DB/CM and the Submittal Coordinator (A/E or AOR)

GC/DB/CM steps:

1. In the Submittal Register and make sure “All” and “Closed” are selected under the filter setting

2. Click on the submittal to open the Submittal Item Details page and then click on “Re-Open”

3. Click on the Package # to access the Submittal Package Details Page

Project	*Amy Hwang - EB Submittal & Close Out Demo	Project Number	EUT-205000
Title	Item Demo - Send for Review	Status	NEW
Number	3	Item Status	Open
Description		Priority	
Package #	2-0		

4. In the Submittal Package details page, select the submittal item(s) via the checkbox and click “Send for Review”

Item Details	Title	#	Rev #	Spec Section	Sub Section	Category	Status	Submittal Coordinator	Held By	Reviewers
<input checked="" type="checkbox"/>	Demo Submittal Item	3	0	08 71 00 - DOOR HARDWARE		Product Data	NEW		Amy Hwang	

Submittal Coordinator (A/E or AOR) step:

5. Update the status to “RAR” or “ONH” and return the item via “Send to Contractor” (see steps in the “Return Submittal To Contractor – A/E or AOR” section)

GC/DB/CM steps:

6. Click on the submittal to open the Submittal Item Details page and click “Edit”

- Attach files or update the fields as needed (e.g., warranty start and end date, building location, spec section number and title)
- Resend the submittal for re-approval following the steps in the “Sending Submittal Out for Review – GC/DB/CM” section

Submittal Coordinator (A/E or AOR) step:

- Update the status and return the item via “Send to Contractor” (see steps in the “Return Submittal To Contractor – A/E or AOR” section).

Deleting Submittals – GC/DB/CM

To delete submittal items that are duplicates or are no longer applicable

- In the Submittal Register, click on the package #; this will take you to the Submittal Package Details page.

Item Details	Title	#	Rev #	Package #	Spec Section	Sub Section	Category	Status	Submittal Coordinator	Held By
	Submittal Demo - Delete Item	116	0	2-0	01 00 00 - GENERAL REQUIREMENTS		Product Data	NEW		

- In the Submittal Package Details page, select the submittal item, then select “Remove Items” and click “OK” when prompted. This will change the submittal item to a draft.

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

Send for Review Submit to GC Send to Sub Create Revision Add Items Remove Items

Item Details	Title	#	Rev #	Spec Section	Sub Section	Category	Status	Submittal Coordinator	Held By	Reviewers
	Submittal Demo - Delete Item	116	0	01 00 00 - GENERAL REQUIREMENTS		Product Data	NEW			

- Click on “Submittal Register” under the Project Menu to get to the Submittal Register page. Select the item then click “Delete”

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

Send to Sub Add to Package Add Item Delete Import Submit to GC

Item Details	Title	#	Rev #	Package #	Spec Section	Sub Section	Category	Status	Submittal Coordinator	Held By	Reviewers
	Submittal Demo - Delete Item	116	0		01 00 00 - GENERAL REQUIREMENTS		Product Data	NEW			

- > Documents
- > BIM
- > Schedule
- > Cost
- > Contacts
- > Calendar
- > Equipment
- > Bidding
- > Submittals
- Submittal Register**

Adding or Changing Submittal Coordinator

*Multiple Submittal Coordinators can be assigned in a project. Although each submittal can only be sent to one Submittal Coordinator, all Submittal Coordinators can work on submittals regardless of which Submittal Coordinator was assigned.

1. Click on “Settings” to get to the Submittal Settings page.
2. Edit the Submittal Coordinator field by selecting the new Submittal Coordinator from the list of users on the left and use the arrow button to add the new Submittal Coordinator to the field on the right. Remove obsolete Submittal Coordinators if necessary.

Submittal Settings for *Amy Hwang - EB Submittal & Close Out Demo

Project: *Amy Hwang - EB Submittal & Close Out Demo

Complete Review Date Due Offset: 14

Offset Type: Calendar Days Working Days

Specify Default Folder For Attachments: Documents \ 40 Construction \ 03 Submittals [Change Folder] [Remove Folder]

* Submittal Coordinator:

Select From: All Roles

- AE *Test
- AssistantVP *Test
- AssociateVP *Test
- AUA *Test
- Client *Test
- CloseoutCoordinator *Test
- CMR *Test
- Consultant *Test
- ContractAdmin *Test
- ContractCompliance *Test

Items in review: Amy Hwang

3. Click “Save” at the top right corner.

FREQUENTLY ASKED QUESTIONS (FAQ)

From the AE – Why can't I update the submittal status even though it is held by me?

Check to see how the submittal was sent to you by opening the submittal and clicking on the “History” tab.

[Hidden Projects](#)

Submittal Item Details

Submittal Item Overview | Date Details | **History**

Project	*Close Out Coordinator - Submittal & Close Out Demo/Template	Project Number	EUT-205000
Title	Item Demo - Create Item and & Attach File	Status	NEW
Number	2	Item Status	Draft

In the History table, check to see if “Action” states “Send to Sub”.

[Hidden Projects](#)

Submittal Item Details

Submittal Item Overview | Date Details | **History**

Created By	Hwang, Amy	Created Date	02.19.2020
Last Modified By	Hwang, Amy	Last Modified Date	04.18.2021
Last Action	Hwang, Amy	Last Action Date	10.05.2022

History

Action	User	Date	Description	Previous	New
Send to Sub	Hwang, Amy	10.04.2022 09:36 PM	Sent action to *Test, AE - OSU (osu_ae)	NEW	NEW

If the submittal was sent via “Send to Sub,” the GC/CM/DB needs to resend the submittal. Instructions on how to resend can be found in the [“Sending Submittal Out For Review – GC/DB/CM”](#) section of this tutorial.

From the AE – Can I work on submittals that were sent to my colleague?

Yes. As long as you are one of the Submittal Coordinators, you can work on submittals (e.g., update submittal status, return submittals) even if they were not sent to you. To add yourself to the list of Submittal Coordinators, follow the instructions in the [“Change or Add Submittal Coordinator”](#) section.

From the AE – I updated the submittal status. How come the submittal is still in my court?

The submittal needs to be returned to the GC/CM/DB via the “Send to Contractor” button. Follow instructions in the [“Return Submittal To Contractor – A/E or AOR”](#) section.

From the GC – I need to resubmit a submittal. Should I use the “Create Revision” button?

No, do **NOT** use the “Create Revision” button as it creates a separate Submittal Package. Instead, please follow the instructions in the [“Resubmit Rejected or Revise Resubmit Submittals – GC/DB/CM”](#) section or the [“Update Closed Submittals – GC/DB/CM & A/E or AOR”](#) section.

Items (2) Documents (0) Comments (0) Custom Fields (0) Revisions (0) Attached Viewpoints (0)

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

Buttons:

Item Details	Title	#	Rev #	Spec Section	Sub Section	Category	Status	Submittal Coordinator	Held By	Reviewers
<input type="checkbox"/> 1	Item Demo - Review & Comment - APP	4	0	01 00 00 - GENERAL REQUIREMENTS		Product Data	APP			Reviewers
<input type="checkbox"/> 3	Item Demo - Review & Comment - ANN	5	0	01 00 00 - GENERAL REQUIREMENTS		Product Data	RAR		Amy Hwang	Reviewers