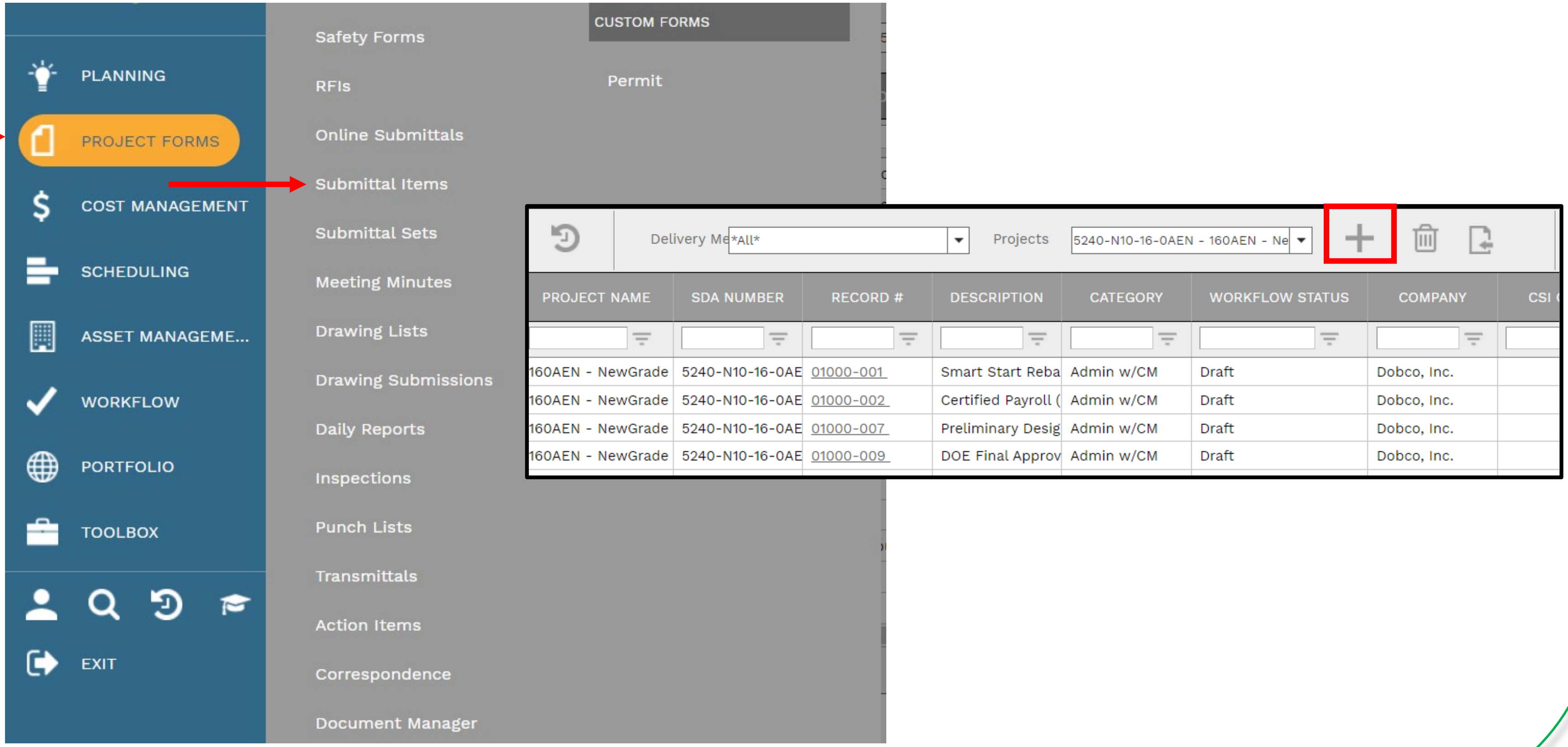
OPEN THE MODULE – SUBMITTAL ITEMS

- Choose **Project Forms -> Submittal Items**
- This displays the **Manager View** for the module and shows all records.
- To search for a document to modify, use the columns to filter for the data you need. For example, use the Record # column to search for a document.
- To add a new document, click the **Add** button

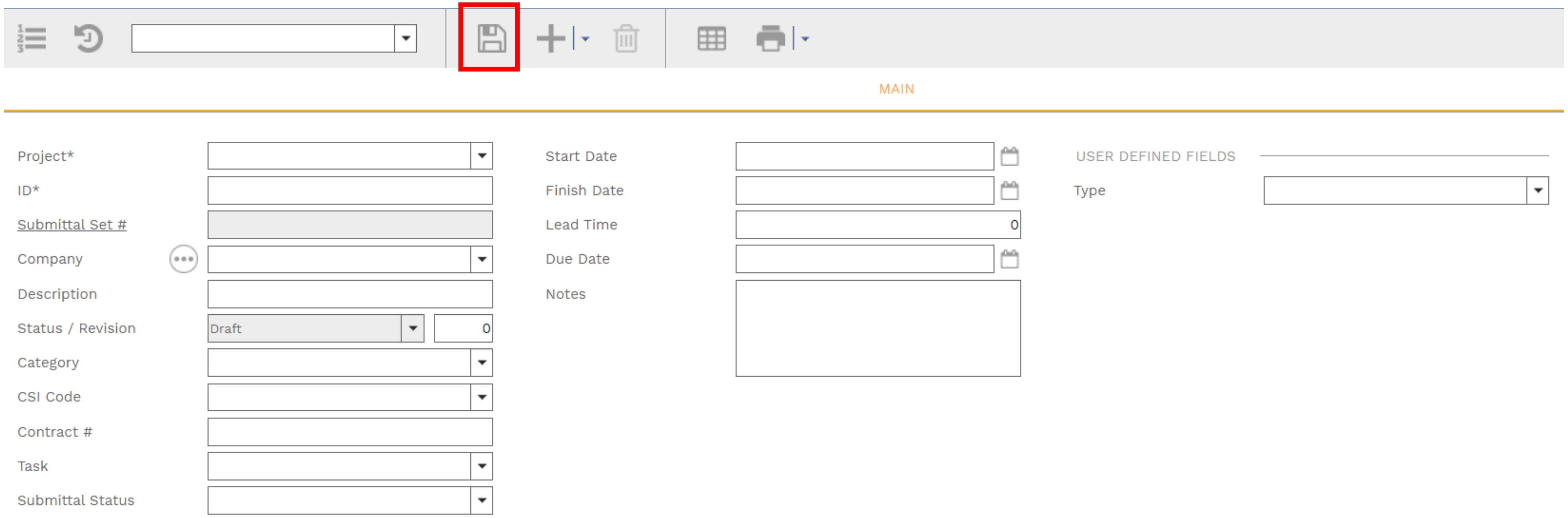


PMWeb
SUBMITTALS
ITEMS AND SETS

NOTE:
Create Submittal Items first, then create Submittal Sets

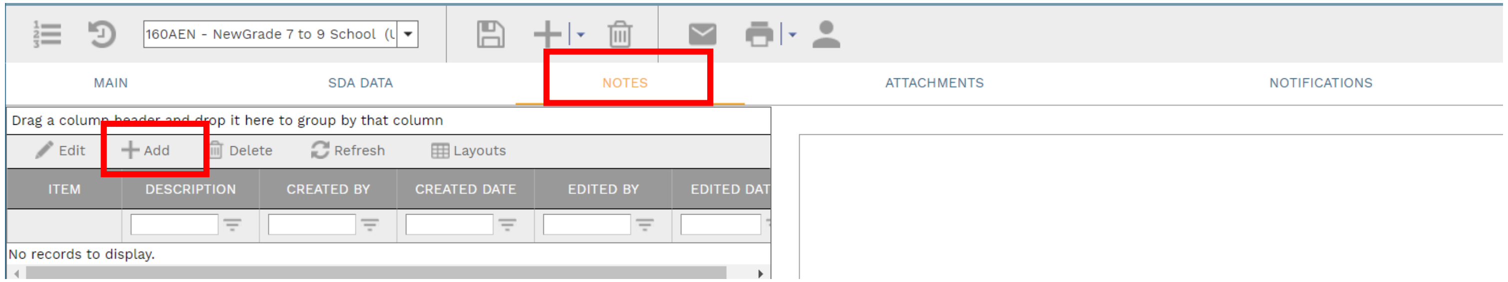
ADD A NEW RECORD (SUBMITTAL ITEM)

- Enter all relevant information in the **document**. Any field marked with an asterisk is a required field. Remember to change the ID# to reflect the numbering scheme for the applicable CSI code plus a dash 1. For example, 0525-1, 0525-2, etc. Each item number must be unique.
- For the Submittal Status field, change this status to reflect the current status of the submittal or revision; must be changed to Approved prior to workflow final approval.
- Click the **Save** button when finished.



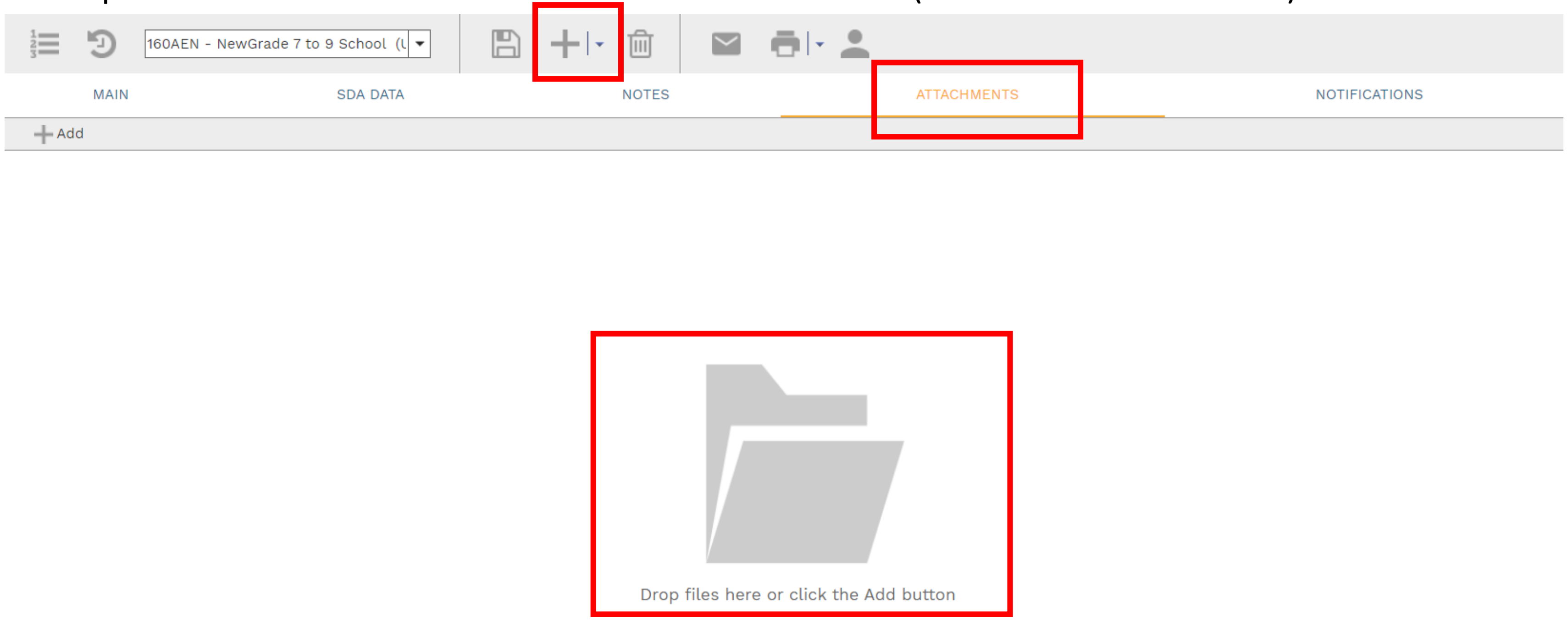
ADD ADDITIONAL NOTES

- Click **Add** on the **Notes tab** to add additional notes as needed. Click the **Save** button after each entry.



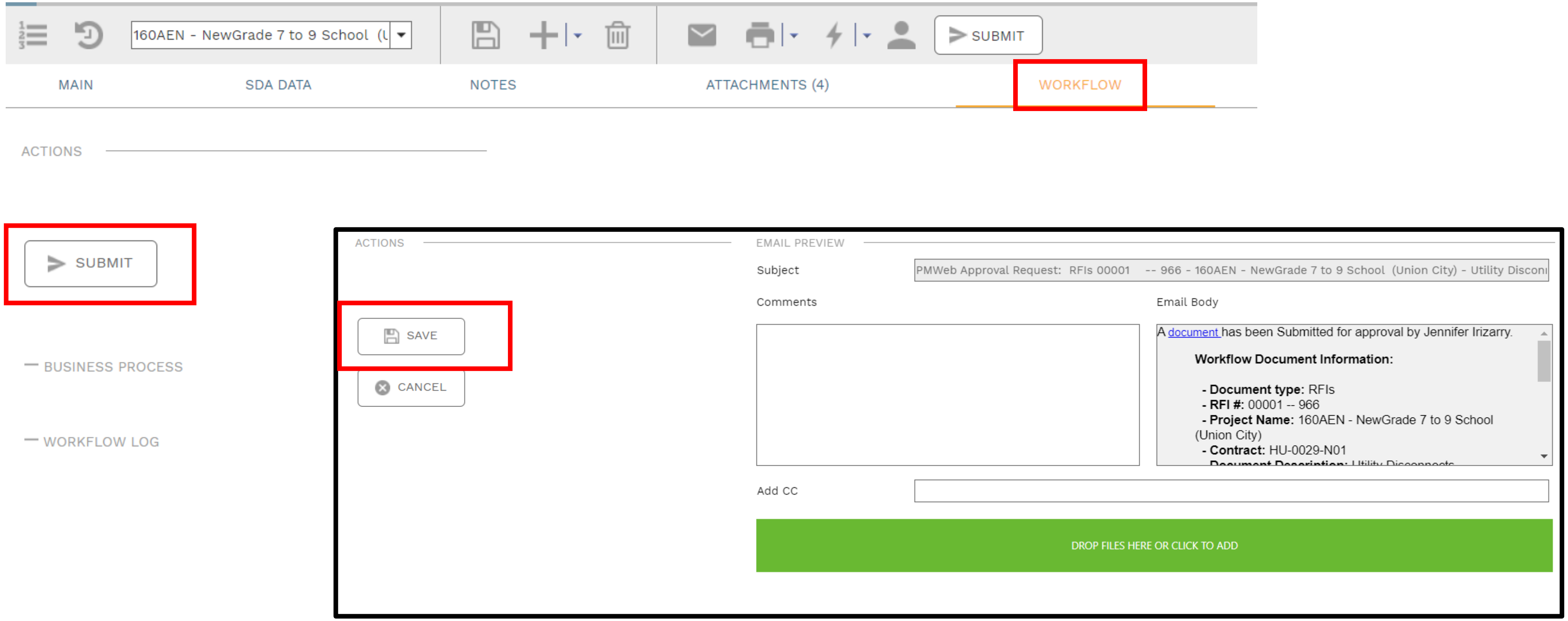
ADD ATTACHMENTS

- Drag and drop files on the **Attachments** tab to add attachments (or click the Add button). Click the **Save** button after each entry.



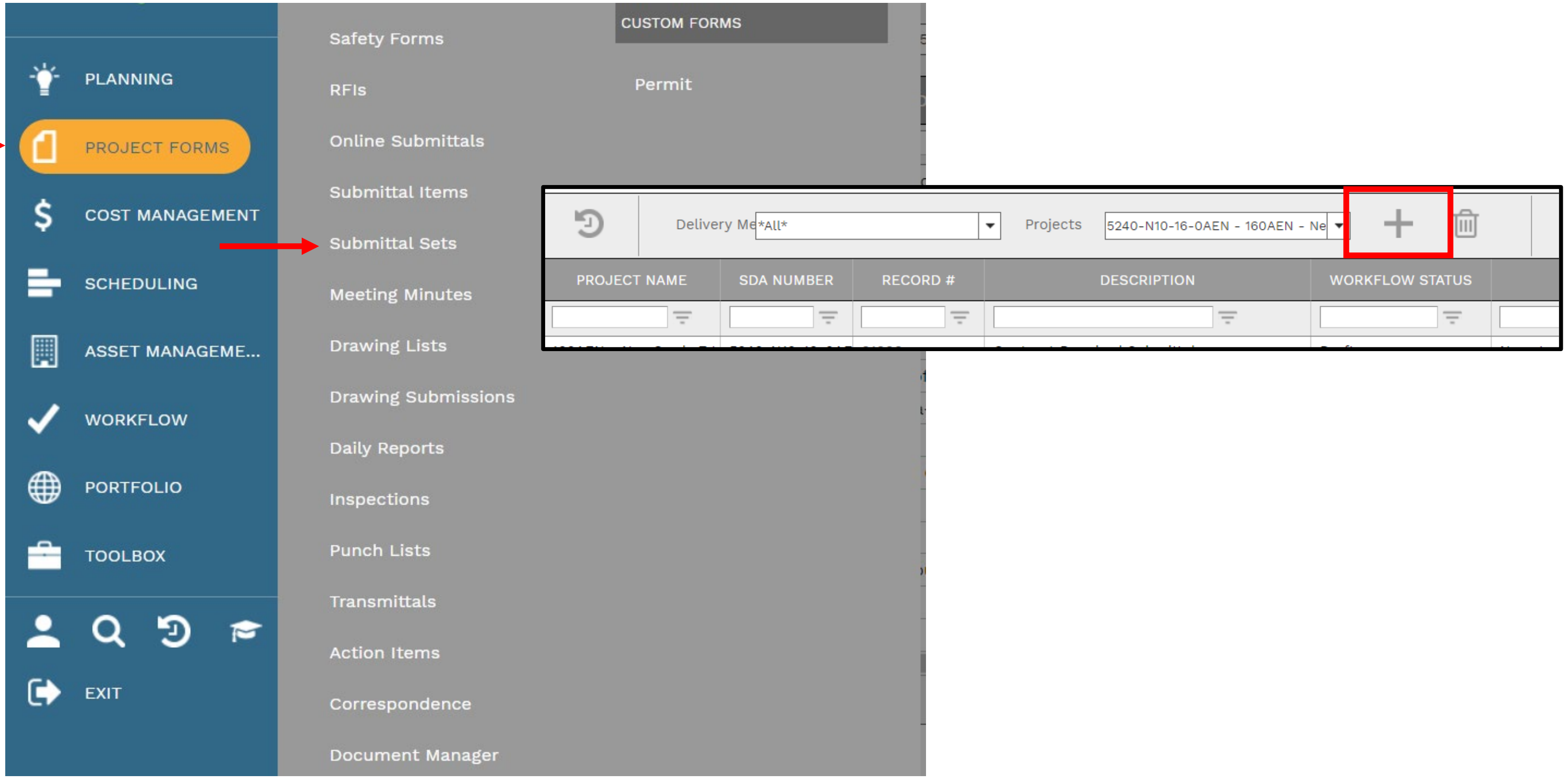
SUBMIT TO WORKFLOW

- Click the **Workflow** tab to start the workflow process. Enter the email information and any application comments, then click the **Submit** button to start the workflow approval process. You can return to this section to review the progress of the approvals.



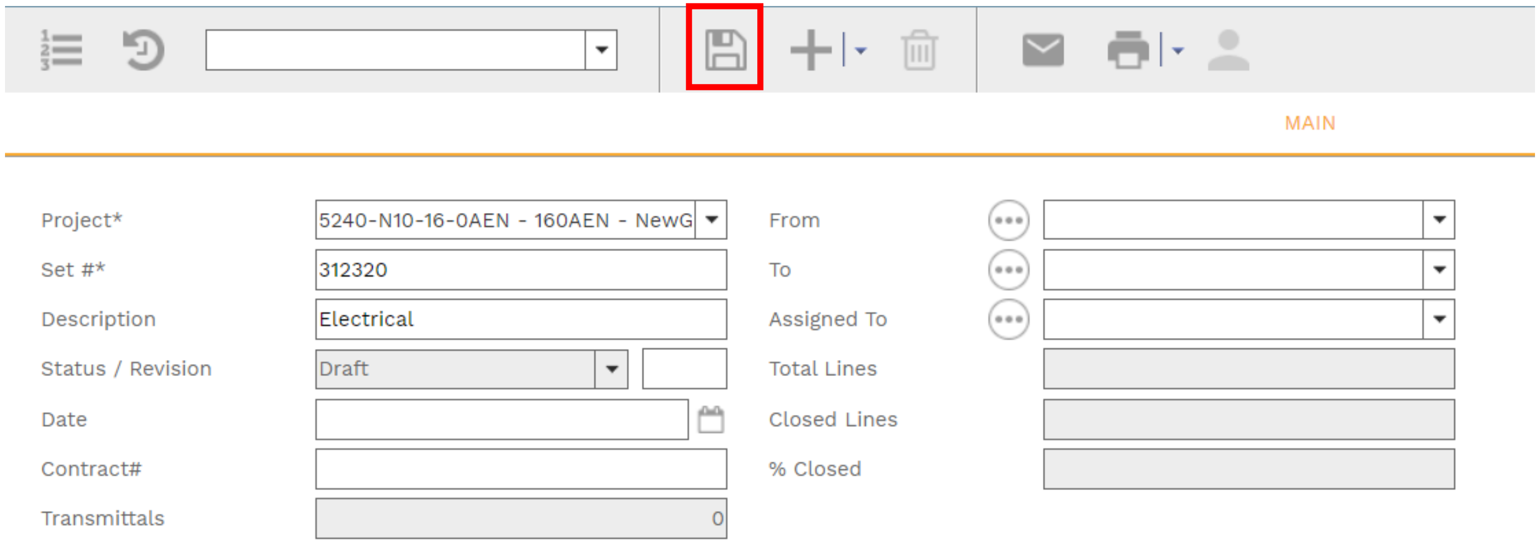
OPEN THE MODULE – SUBMITTAL SETS

- Choose **Project Forms -> Submittal Sets**
- This displays the **Manager View** for the module and shows all records.
- To search for a document to modify, use the columns to filter for the data you need. For example, use the Record # column to search for a document.
- To add a new document, click the **Add** button 

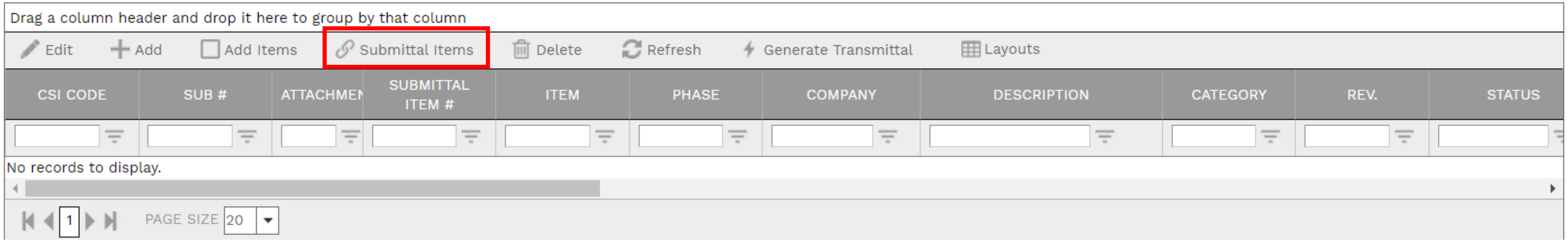


ADD A NEW RECORD (SUBMITTAL SET)

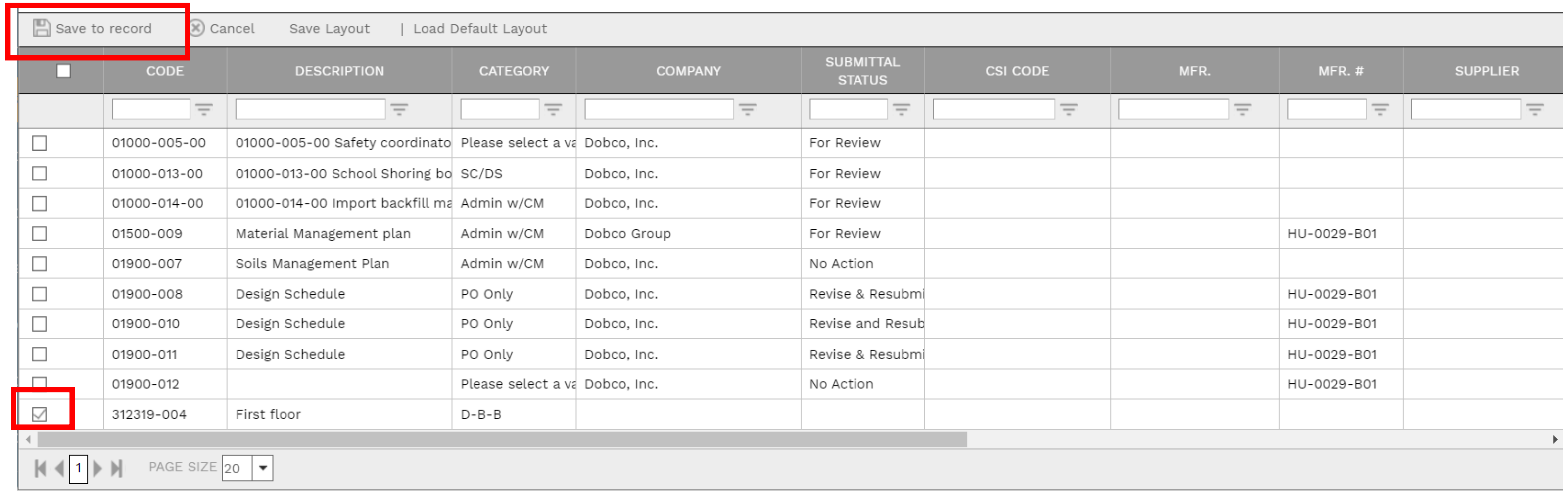
- Enter all relevant information in the **document**. Any field marked with an asterisk is a required field. Remember to change the Set# to reflect the numbering scheme for the applicable CSI code.
- Click the **Save** button when finished.



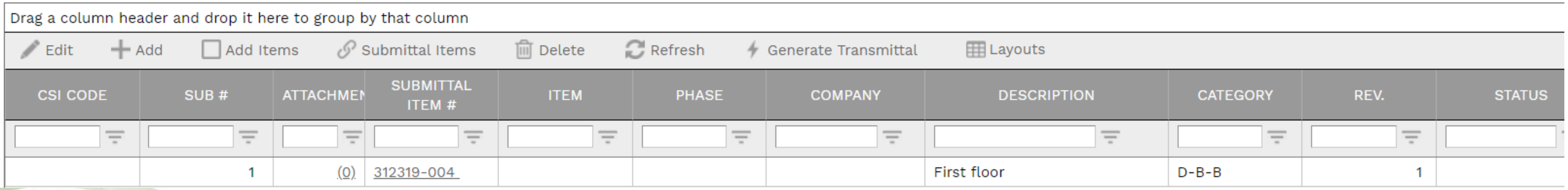
Individual Submittal Items are added at the bottom of the screen. Click **Submittal Items**.



A list of available Submittal Items displays. Search and select all applicable individual Submittal Items by clicking the box next to that item, then click **Save to Record**.

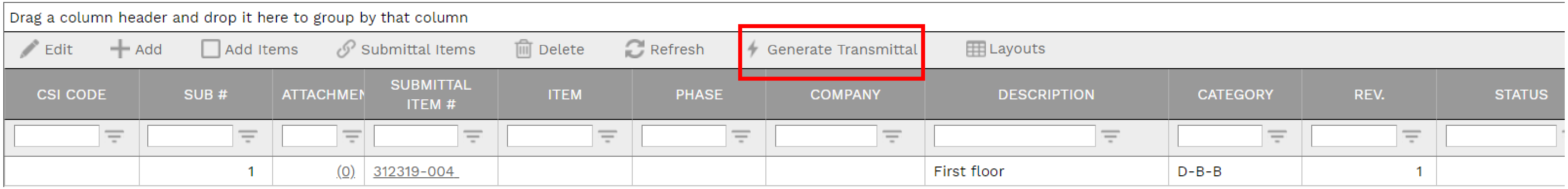


All selected items will be added to the set.

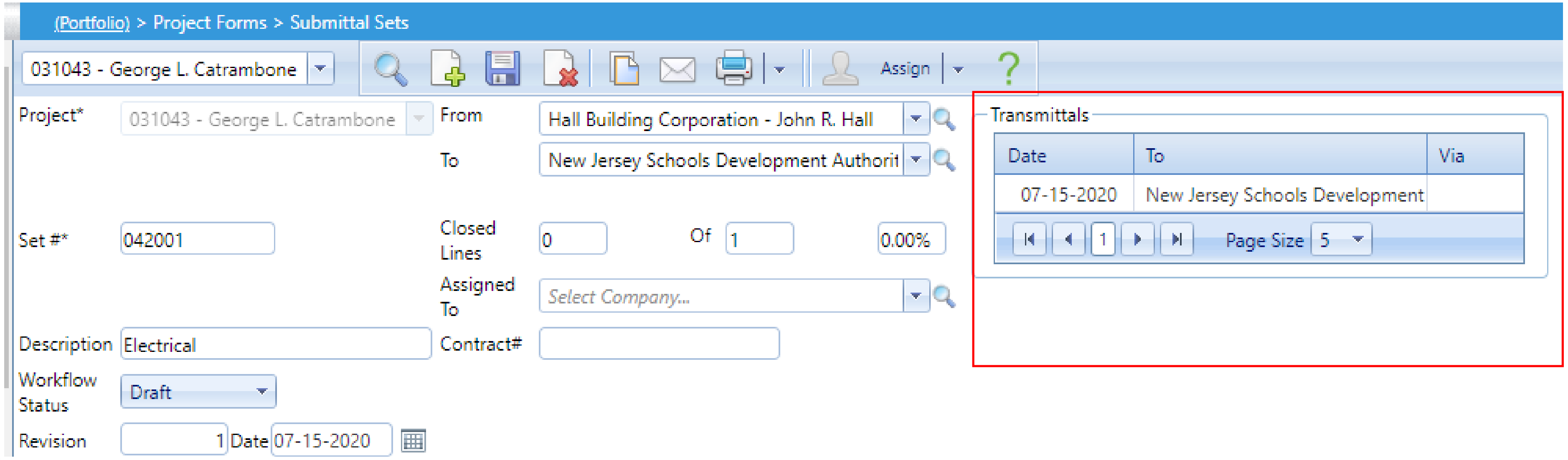


CREATE A TRANSMITTAL

- Highlight the Submittal Item(s) in the Details section and click Generate Transmittal. The Transmittal module will open, complete the required/desired options.

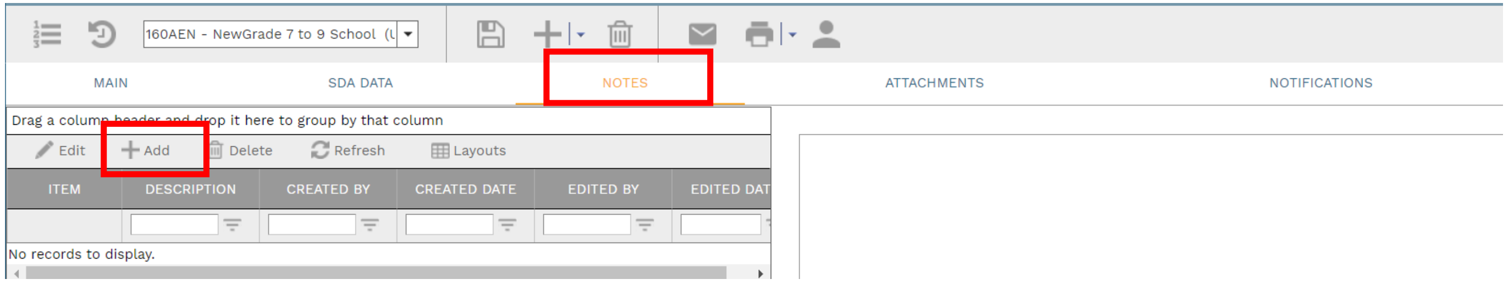


- The Transmittal will be linked to the Submittal Set.



ADD ADDITIONAL NOTES

- Click **Add** on the **Notes tab** to add additional notes as needed. Click the **Save** button after each entry.



ADD ATTACHMENTS

- Drag and drop files on the **Attachments** tab to add attachments (or click the Add button). Click the **Save** button after each entry.