
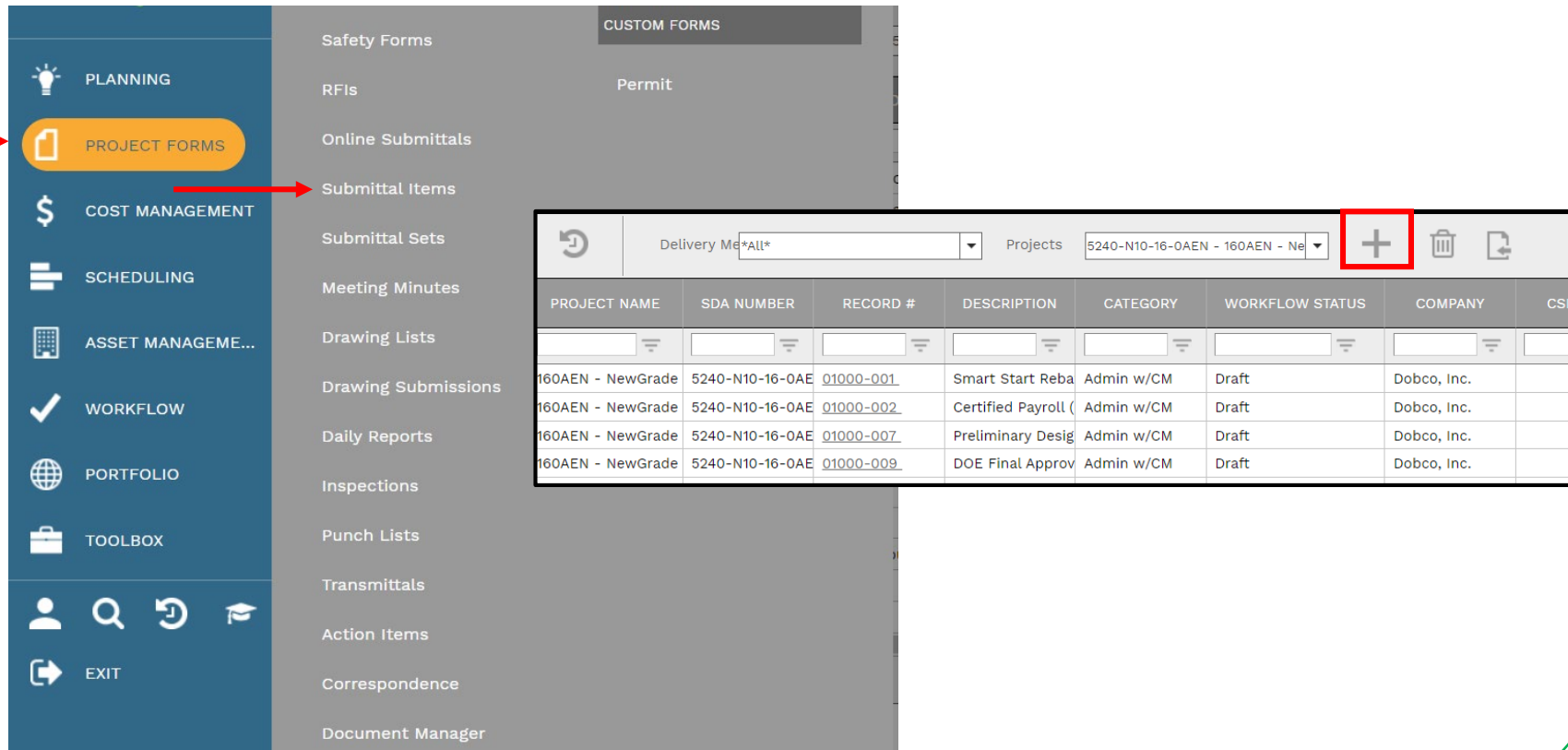


OPEN THE MODULE – SUBMITTAL ITEMS

- 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 



The screenshot shows the PMWeb interface. On the left is a navigation menu with categories: PLANNING, PROJECT FORMS (highlighted with a red arrow), COST MANAGEMENT, SCHEDULING, ASSET MANAGEMEN..., WORKFLOW, PORTFOLIO, TOOLBOX, and EXIT. The main area displays a list of submittal items under the heading 'CUSTOM FORMS'. A red arrow points to 'Submittal Items' in the left menu. Below the menu is a table with columns: PROJECT NAME, SDA NUMBER, RECORD #, DESCRIPTION, CATEGORY, WORKFLOW STATUS, COMPANY, and CSI. The table contains four rows of data. Above the table is a search bar with 'Delivery Me*ALL*' and a 'Projects' dropdown. A red box highlights the '+' button in the top right corner of the table area.

PROJECT NAME	SDA NUMBER	RECORD #	DESCRIPTION	CATEGORY	WORKFLOW STATUS	COMPANY	CSI
160AEN - NewGrade	5240-N10-16-OAE	01000-001	Smart Start Reba	Admin w/CM	Draft	Dobco, Inc.	
160AEN - NewGrade	5240-N10-16-OAE	01000-002	Certified Payroll (Admin w/CM	Draft	Dobco, Inc.	
160AEN - NewGrade	5240-N10-16-OAE	01000-007	Preliminary Desig	Admin w/CM	Draft	Dobco, Inc.	
160AEN - NewGrade	5240-N10-16-OAE	01000-009	DOE Final Approv	Admin w/CM	Draft	Dobco, Inc.	



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.



1 2 3 4 5 6 7 8 9 10 11 12

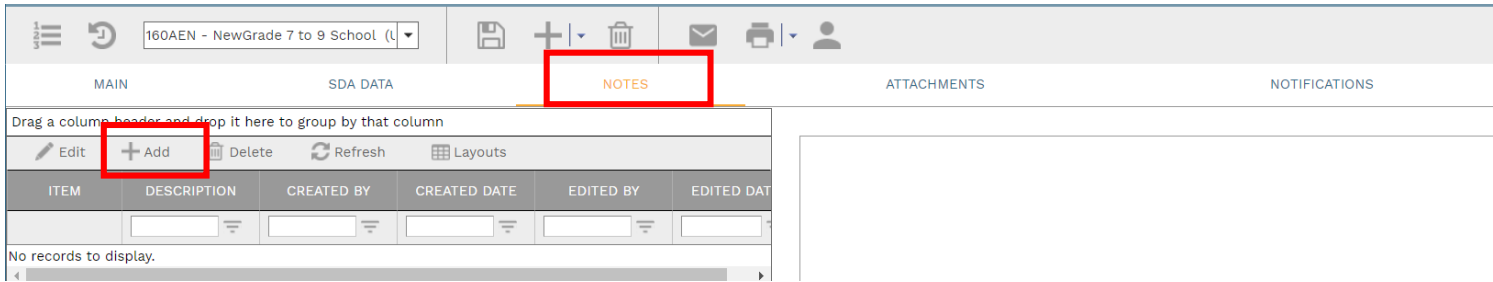
☰ ↻ 🔍 ▼  + | - 🗑️ 📅 🖨️ | -

MAIN

Project*	<input type="text"/>	Start Date	<input type="text"/>	USER DEFINED FIELDS	<input type="text"/>
ID*	<input type="text"/>	Finish Date	<input type="text"/>	Type	<input type="text"/>
Submittal Set #	<input type="text"/>	Lead Time	<input type="text" value="0"/>		
Company	<input type="text"/>	Due Date	<input type="text"/>		
Description	<input type="text"/>	Notes	<input type="text"/>		
Status / Revision	<input type="text" value="Draft"/> <input type="text" value="0"/>				
Category	<input type="text"/>				
CSI Code	<input type="text"/>				
Contract #	<input type="text"/>				
Task	<input type="text"/>				
Submittal Status	<input type="text"/>				

ADD ADDITIONAL NOTES

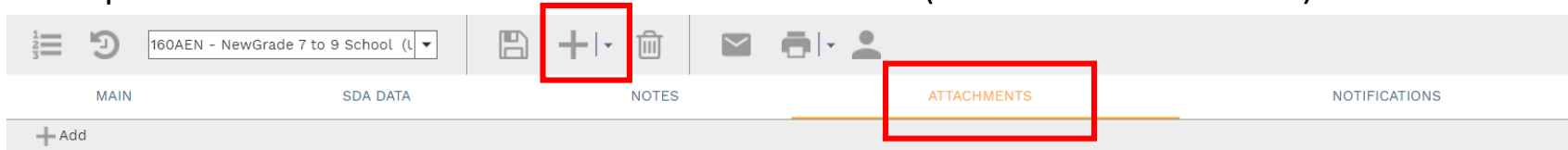
- Click **Add** on the **Notes tab** to add additional notes as needed. Click the **Save** button after each entry.



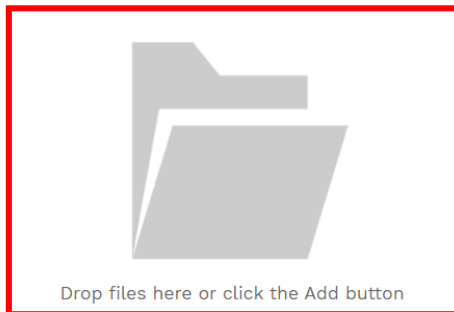
The screenshot shows a software interface with a top navigation bar containing icons for menu, refresh, search, save, add, delete, email, print, and user. Below the navigation bar are tabs for MAIN, SDA DATA, NOTES, ATTACHMENTS, and NOTIFICATIONS. The 'NOTES' tab is selected and highlighted with a red box. Below the tabs is a table with a toolbar containing 'Edit', '+ Add', 'Delete', 'Refresh', and 'Layouts'. The '+ Add' button is highlighted with a red box. The table has columns for ITEM, DESCRIPTION, CREATED BY, CREATED DATE, EDITED BY, and EDITED DATE. Below the table, it says 'No records to display.'

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.



The screenshot shows the same software interface as above, but with the 'ATTACHMENTS' tab selected and highlighted with a red box. The 'Add' button in the table toolbar is also highlighted with a red box.



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.

160AEN - NewGrade 7 to 9 School (l)

MAIN SDA DATA NOTES ATTACHMENTS (4) **WORKFLOW**

ACTIONS

SUBMIT

BUSINESS PROCESS

WORKFLOW LOG

ACTIONS

EMAIL PREVIEW

Subject: PMWeb Approval Request: RFIs 00001 -- 966 - 160AEN - NewGrade 7 to 9 School (Union City) - Utility Disconn

Comments

Email Body

A [document](#) has been Submitted for approval by Jennifer Irizarry.

Workflow Document Information:

- Document type: RFIs
- RFI #: 00001 -- 966
- Project Name: 160AEN - NewGrade 7 to 9 School (Union City)
- Contract: HU-0029-N01
- Document Description: Utility Disconnect


Add CC

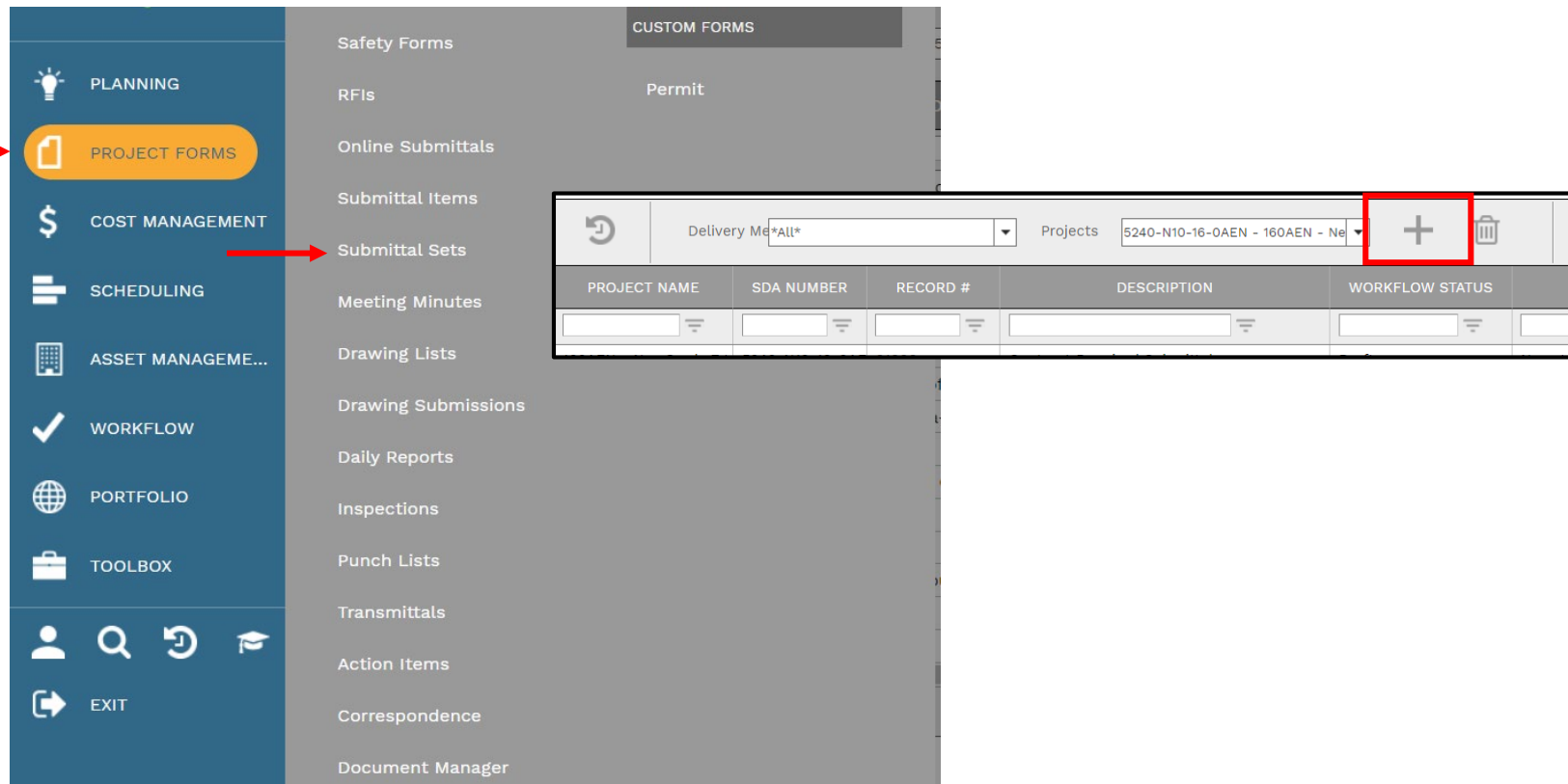
DROP FILES HERE OR CLICK TO ADD

SAVE

CANCEL

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 



The screenshot displays the software interface. On the left is a dark blue navigation menu with icons and labels for various modules: PLANNING, PROJECT FORMS (highlighted with a red arrow), COST MANAGEMENT, SCHEDULING, ASSET MANAGEME..., WORKFLOW, PORTFOLIO, TOOLBOX, and EXIT. The main content area is light gray and shows a list of modules under the 'CUSTOM FORMS' tab: Safety Forms, RFIs, Permit, Online Submittals, Submittal Items, Submittal Sets (highlighted with a red arrow), Meeting Minutes, Drawing Lists, Drawing Submissions, Daily Reports, Inspections, Punch Lists, Transmittals, Action Items, Correspondence, and Document Manager. An inset window shows the 'Submittal Sets' manager view. It features a search bar with 'Delivery Me*All*' and a 'Projects' dropdown set to '5240-N10-16-OAEN - 160AEN - Ne'. A red box highlights the '+ Add' button. Below the search bar is a table with columns: PROJECT NAME, SDA NUMBER, RECORD #, DESCRIPTION, and WORKFLOW STATUS. The table is currently empty.

PROJECT NAME	SDA NUMBER	RECORD #	DESCRIPTION	WORKFLOW STATUS
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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.



MAIN

Project*	5240-N10-16-OAEN - 160AEN - NewG	From	...
Set #*	312320	To	...
Description	Electrical	Assigned To	...
Status / Revision	Draft	Total Lines	
Date		Closed Lines	
Contract#		% Closed	
Transmittals	0		

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

Drag a column header and drop it here to group by that column

Edit + Add Add Items **Submittal Items** Delete Refresh Generate Transmittal Layouts

CSI CODE	SUB #	ATTACHMEN	SUBMITTAL ITEM #	ITEM	PHASE	COMPANY	DESCRIPTION	CATEGORY	REV.	STATUS

No records to display.

1 PAGE SIZE 20

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**.

Save to record Cancel Save Layout Load Default Layout

	CODE	DESCRIPTION	CATEGORY	COMPANY	SUBMITTAL STATUS	CSI CODE	MFR.	MFR. #	SUPPLIER
<input type="checkbox"/>	01000-005-00	01000-005-00 Safety coordinato	Please select a v	Dobco, Inc.	For Review				
<input type="checkbox"/>	01000-013-00	01000-013-00 School Shoring bo	SC/DS	Dobco, Inc.	For Review				
<input type="checkbox"/>	01000-014-00	01000-014-00 Import backfill ma	Admin w/CM	Dobco, Inc.	For Review				
<input type="checkbox"/>	01500-009	Material Management plan	Admin w/CM	Dobco Group	For Review			HU-0029-B01	
<input type="checkbox"/>	01900-007	Soils Management Plan	Admin w/CM	Dobco, Inc.	No Action				
<input type="checkbox"/>	01900-008	Design Schedule	PO Only	Dobco, Inc.	Revise & Resubmi			HU-0029-B01	
<input type="checkbox"/>	01900-010	Design Schedule	PO Only	Dobco, Inc.	Revise and Resub			HU-0029-B01	
<input type="checkbox"/>	01900-011	Design Schedule	PO Only	Dobco, Inc.	Revise & Resubmi			HU-0029-B01	
<input type="checkbox"/>	01900-012		Please select a v	Dobco, Inc.	No Action			HU-0029-B01	
<input checked="" type="checkbox"/>	312319-004	First floor	D-B-B						

1 PAGE SIZE 20

All selected items will be added to the set.

Drag a column header and drop it here to group by that column

Edit + Add Add Items Submittal Items Delete Refresh Generate Transmittal Layouts

CSI CODE	SUB #	ATTACHMEN	SUBMITTAL ITEM #	ITEM	PHASE	COMPANY	DESCRIPTION	CATEGORY	REV.	STATUS
	1	(0)	312319-004				First floor	D-B-B	1	

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.

Drag a column header and drop it here to group by that column

Edit + Add Add Items Submittal Items Delete Refresh **Generate Transmittal** Layouts

CSI CODE	SUB #	ATTACHMEN	SUBMITTAL ITEM #	ITEM	PHASE	COMPANY	DESCRIPTION	CATEGORY	REV.	STATUS
	1	(0)	<u>312319-004</u>				First floor	D-B-B	1	

- The Transmittal will be linked to the Submittal Set.

(Portfolio) > Project Forms > Submittal Sets

031043 - George L. Catrambone

Project* 031043 - George L. Catrambone From Hall Building Corporation - John R. Hall To New Jersey Schools Development Authority

Set #* 042001 Closed Lines 0 Of 1 0.00%

Description Electrical Contract#

Workflow Status Draft

Revision 1 Date 07-15-2020

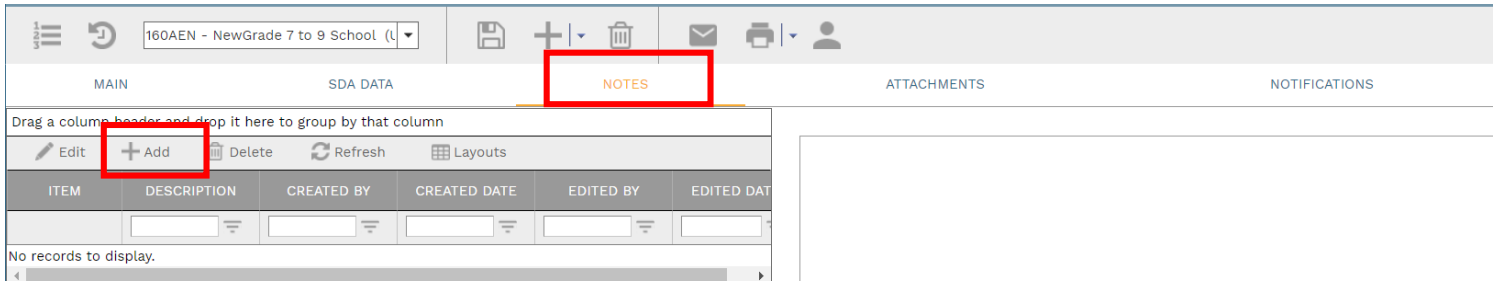
Transmittals

Date	To	Via
07-15-2020	New Jersey Schools Development	

Page Size 5

ADD ADDITIONAL NOTES

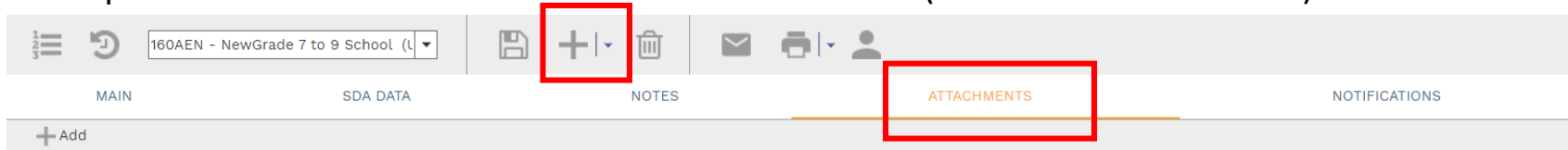
- Click **Add** on the **Notes tab** to add additional notes as needed. Click the **Save** button after each entry.



The screenshot shows a software interface with a top navigation bar containing icons for menu, refresh, search, save, add, delete, email, print, and user. Below the navigation bar are tabs for MAIN, SDA DATA, **NOTES**, ATTACHMENTS, and NOTIFICATIONS. The **NOTES** tab is active. Below the tabs is a toolbar with 'Edit', '+ Add', 'Delete', 'Refresh', and 'Layouts'. The '+ Add' button is highlighted with a red box. Below the toolbar is a table with columns: ITEM, DESCRIPTION, CREATED BY, CREATED DATE, EDITED BY, and EDITED DATE. The table is currently empty, displaying 'No records to display.'

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.



The screenshot shows the same software interface as above, but with the **ATTACHMENTS** tab selected. The '+ Add' button in the toolbar and the **ATTACHMENTS** tab are both highlighted with red boxes.

