SUBMITTAL ITEMS AND SETS

Creating Submittal Items

Technical submittals, administrative requirements, samples, designs, plan reviews, permits – anything that requires a review process can be tracked in the **Submittal Items** and **Submittal Sets** modules. Submittal Items are typically created first, then if desired, can be pulled into a Submittal Set.

To navigate to the Submittals Items, click **Project Forms**, then **Submittal Items** from the left hand menu. This displays the overall **Manager View** for the module and shows all records for all projects.

To search for an existing document, use the columns to filter for the data you need. For example, use the Record# column to search for a document. You can also narrow your search by school name by selecting it from the **Projects** drop down menu.

To add a new document, click the **Add** button.

The document screen displays. Enter the following information:

- Project (required)
- ID# (required) – change this number to reflect the numbering scheme of the applicable CSI code plus a dash 1. For example, 0525-1, 0525-2, etc. Each item number must be unique.
- Submittal Set # - will be automatically completed if linked to a set
- Company
- Description
- Category (required) – choice will dictate what type of workflow will be used
- CSI Code
- Contract #
- Workflow Status – will be automatically completed
- Revision – if this is a revision, change this number to the next revision number
- Submittal Status – change this status to reflect the current status of the submittal or revision; must be changed to Approved prior to workflow final approval

- Start Date – do not complete
- Finish Date – do not complete
- Due Date – start date of submittal
- Notes
- Type – type of Submittal

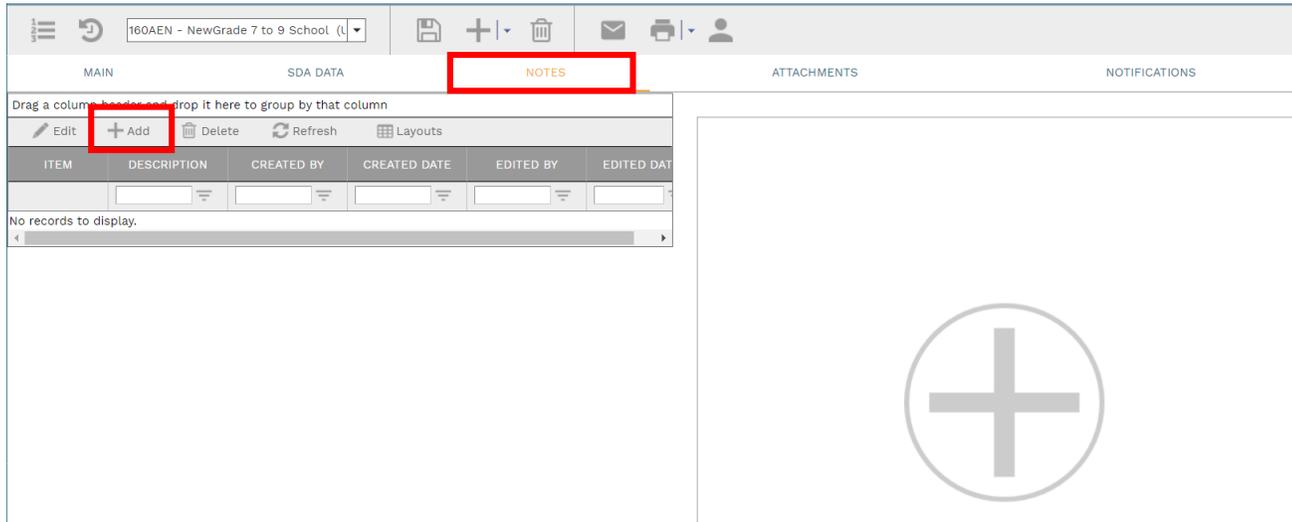*Note: the history of all revisions will be captured in the Notes tab and/or through the Attachments tab*

Once completed, click the **Save** button to continue.

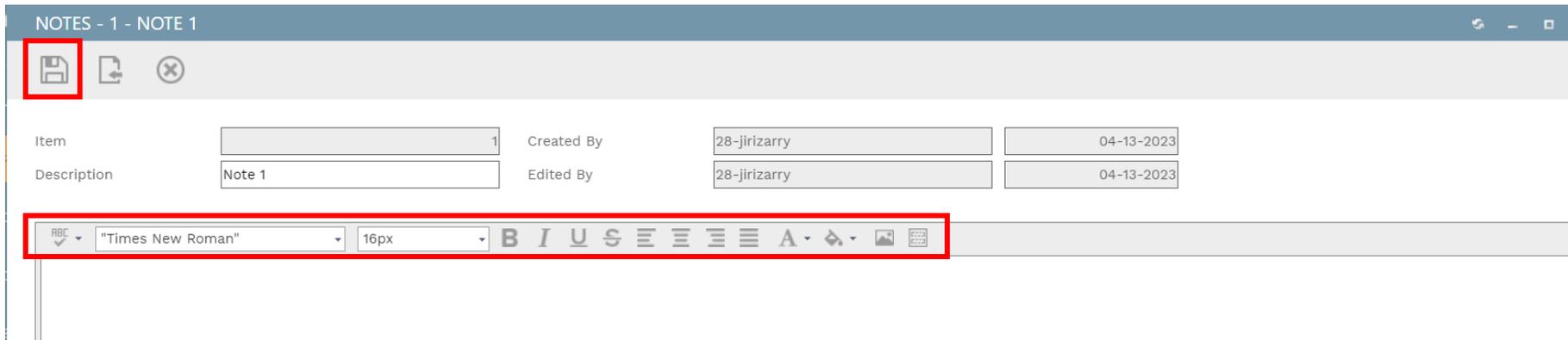**Note:** This section can be completed ahead of time in preparation for upcoming submittals.

Click **Add** on the **Notes tab** to add additional notes as needed.

Enter your notes in the field provided. The text can be formatted using the toolbar shown. There is no limit to the amount of text you can enter. Click the **Save** button when completed.

NOTE: The **SDA Data** tab will be used for legacy information that has been copied from the previously used project management tool. *No entry in this section is required.*

On the **Attachments tab**, you can drag-and-drop your desired attachment(s) in the middle section of the screen, or you can choose **Add** to manually navigate to the location of your attachment on your computer, and add it through that window. Repeat the process for all additional attachments. Click the **Save** button when finished.
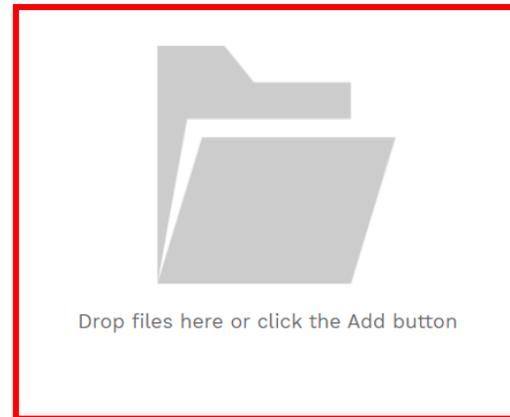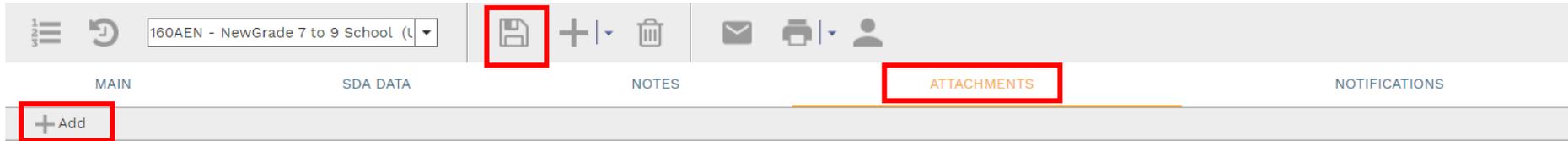
Note: *if a revision has been entered, the Submittal log report should be attached to this tab. This report is obtained through the print button in the header section, and will show information about all submittals.*

A **Workflow** is an automatic process initiated for the review of a document. Individuals who are responsible for reviewing, submitting information or approving the document have already been identified for this project and module.

On the **Workflow tab,** click the **Submi**t button to begin the workflow process. The information for this workflow is shown, click **Save** to continue and initiate the workflow. Enter comments or additional email addresses if needed. As the document moves through the review/approval process, you will be able to come back to this screen to see the progress.

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

Note: The Program Officer's name should be selected on those packages that the Design Studio is not reviewing.

ACTIONS

SUBMIT

— BUSINESS PROCESS

— WORKFLOW LOG

ACTIONS

SAVE

CANCEL

EMAIL PREVIEW

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

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 Disconnects

Add CC

DROP FILES HERE OR CLICK TO ADD

— BUSINESS PROCESS

Refresh

#	TYPE	ALL MUST APPROVE?	DUE DATE	ROLE	USER	DELEGATE	INSTRUCTIONS
	👤	☐		-- Submitter --			
1	⛓			-- APM --	Prevent Submit if Category Blank		A value other than "Please select a value" is required to select to branch workflow.

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You will be able to monitor the progress of the workflow process by referring to the Workflow Status field. If the document is returned at any point along the way, you will be able to modify as needed and resubmit the document in the workflow process.

Note: the Workflow Status field is different than the Submittal Status field. The Workflow status shows the status of the review in the workflow, while the Submittal Status shows the status of the document itself.

Project	5240-N10-16-0AEN - 160AEN - NewG ▼
RFI #*	00001 -- 966
Description	Utility Disconnects **MK:cdb67b19966c
Contract #	HU-0029-N01
Status	Draft ▼ 0

To print Submittal Item information, click the **print button** and select **BI Reporting** from the drop down list. Choose an option from the report menu to receive your output (either Adobe or export to Excel) or to cancel the Reports Preview screen.

Note: Please be patient when waiting for output from a selected report. It may take a few minutes to load the data.

PMWeb®

Creating Submittal Sets

Submittal Sets will allow you to group individual Submittal Items into one document. These documents would be tied together using the numbering scheme of the CSI code.

To navigate to the Submittals Sets, click **Project Forms**, then **Submittal Sets** from the left hand menu. This displays the overall **Manager View** for the module and shows all records for all projects.

To search for an existing document, use the columns to filter for the data you need. For example, use the Record# column to search for a document. You can also narrow your search by school name by selecting it from the **Projects** drop down menu.

To add a new document, click the **Add** button.

The document screen displays. Enter the following information:

- Project (required)
- Set # (required) – change this number to reflect the numbering scheme of the applicable CSI code
- Description
- Workflow Status – will be automatically completed
- Revision – if this is a revision, change this number to the next revision number
- Contract #
- Date

- From
- To
- Assigned To

Once completed, click the **Save** button to continue.

Note: This section can be completed ahead of time in preparation for upcoming submittals.

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.

To create a Transmittal to go along with this Submittal Set, highlight the Submittal Item(s) in the Details section and click Generate Transmittal. The Transmittal module will open, complete the required/desired options as described in the Transmittals module user guide.


Once completed, the Transmittal will be linked to the Submittal Set.

Click **Add** on the **Notes tab** to add additional notes as needed.


Enter your notes in the field provided. The text can be formatted using the toolbar shown. There is no limit to the amount of text you can enter. Click the **Save** button when completed.

On the **Attachments tab**, you can drag-and-drop your desired attachment(s) in the middle section of the screen, or you can choose **Add** to manually navigate to the location of your attachment on your computer, and add it through that window. Repeat the process for all additional attachments. Click the **Save** button when finished.
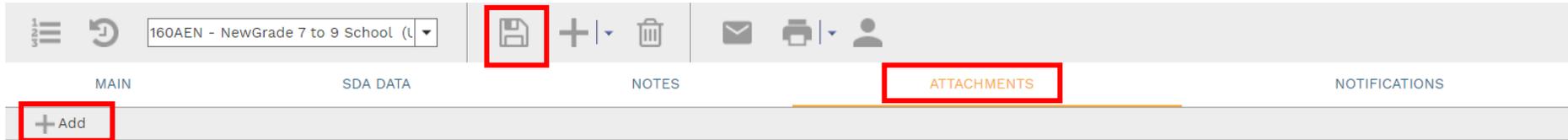
Note: *if a revision has been entered, the Submittal log report should be attached to this tab. This report is obtained through the print button in the header section, and will show information about all submittals. See page 9 for printing instructions.*
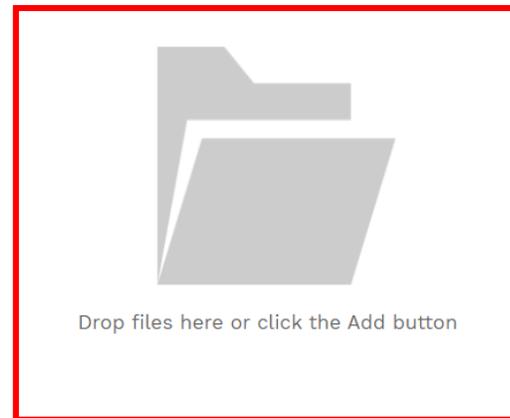
To print the Submittal Set information, click the **print button** in the Header section and select **BI Reporting** from the drop down list. Choose an option from the report menu to receive your output or to cancel the Reports Preview screen.

Note: Please be patient when waiting for output from a selected report. It may take a few minutes to load the data.