

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 screenshot shows the software interface with a navigation menu on the left and a data table on the right. The 'PROJECT FORMS' menu item is highlighted with a red arrow. The sub-menu 'Submittal Items' is also highlighted with a red arrow. The table toolbar contains a red box around the '+' button. The table below shows a list of submittal items with columns for Project Name, SDA Number, Record #, Description, Category, Workflow Status, Company, CSI Code, Submittal Status, MFR #, and Revision #.

PROJECT NAME	SDA NUMBER	RECORD #	DESCRIPTION	CATEGORY	WORKFLOW STATUS	COMPANY	CSI CODE	SUBMITTAL STATUS	MFR #	REVISION #
160AEN - NewGrade	5240-N10-16-OAE	01000-001	Smart Start Reba	Admin w/CM	Draft	Dobco, Inc.		UnSubmitted	HU-0029-B01	0
160AEN - NewGrade	5240-N10-16-OAE	01000-002	Certified Payroll	Admin w/CM	Draft	Dobco, Inc.		UnSubmitted	HU-0029-B01	0
160AEN - NewGrade	5240-N10-16-OAE	01000-007	Preliminary Desig	Admin w/CM	Draft	Dobco, Inc.		UnSubmitted	HU-0029-B01	0
160AEN - NewGrade	5240-N10-16-OAE	01000-009	DOE Final Approv	Admin w/CM	Draft	Dobco, Inc.		UnSubmitted	HU-0029-B01	0

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

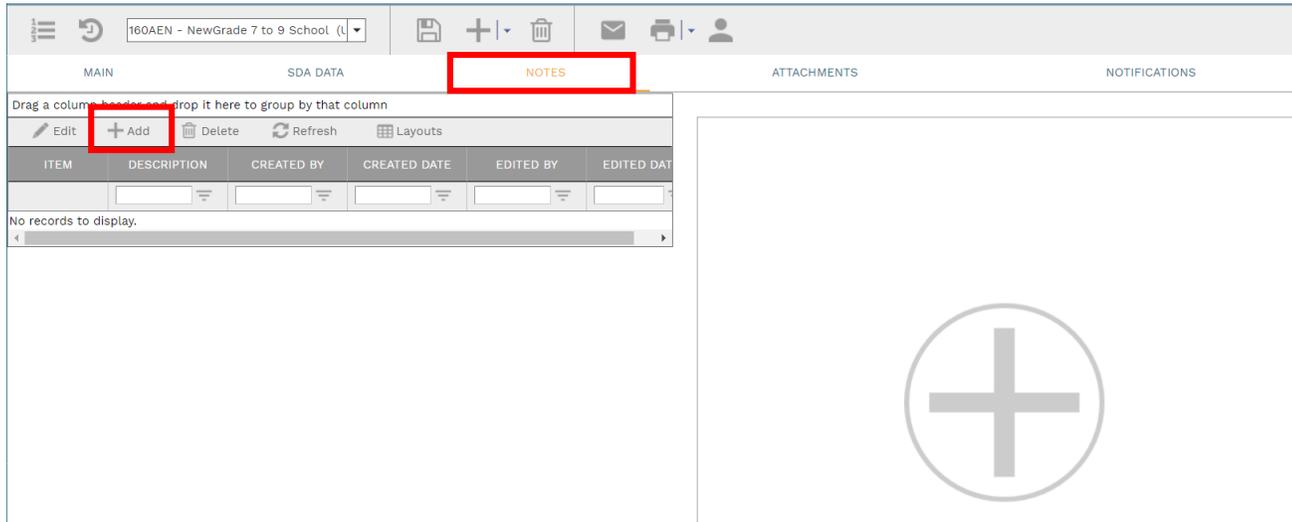
Once completed, click the **Save** button to continue.

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

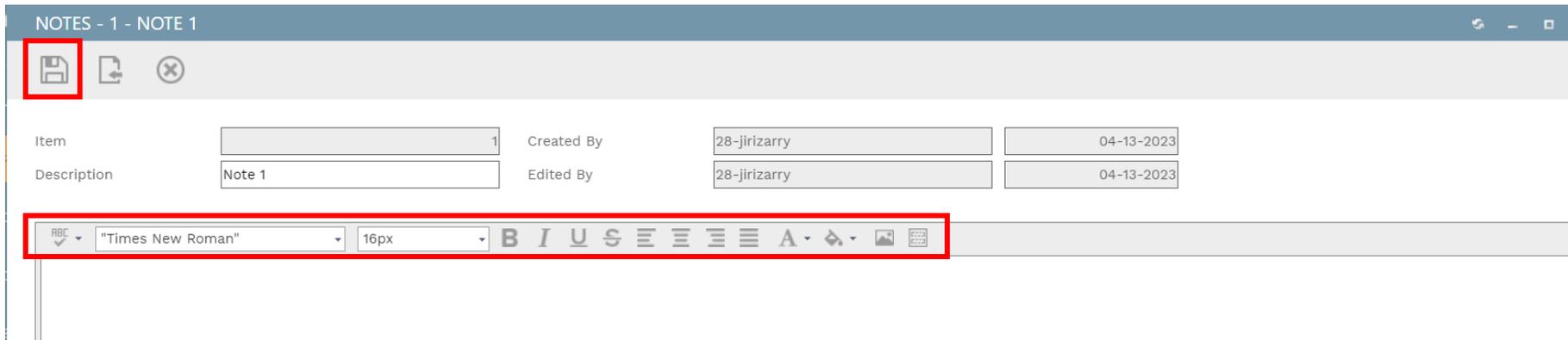
The screenshot shows a software interface with a top navigation bar containing icons for menu, refresh, search, save, add, delete, calendar, and print. The 'add' icon is highlighted with a red box. Below the navigation bar is a form with the following fields:

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"/>				

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

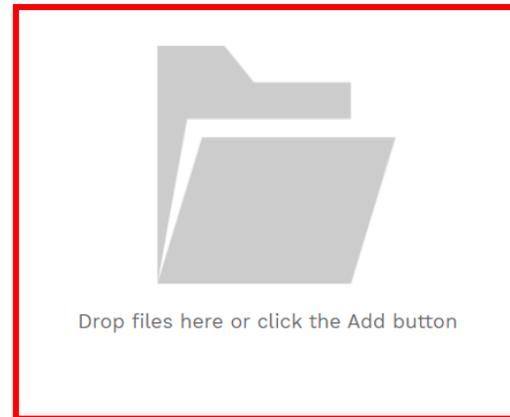
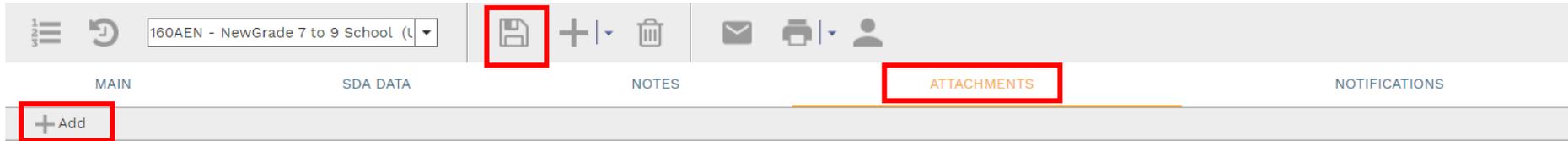


Enter your notes in the field provided. The text can be formatted using the toolbar shown. There is no limit to the amount of text you can enter. Click the **Save** button when completed.



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 **Submit** 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.

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

— BUSINESS PROCESS

— WORKFLOW LOG

EMAIL PREVIEW

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

Comments: [Empty text area]

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: [Input field]

DROP FILES HERE OR CLICK TO ADD

— BUSINESS PROCESS

#	TYPE	ALL MUST APPROVE?	DUE DATE	ROLE	USER	DELEGATE	INSTRUCTIONS
	[Person icon]	<input type="checkbox"/>		-- Submitter --			
1	[Group icon]			-- APM --	Prevent Submit if Category Blank		A value other than "Please select a value" is required to select to branch workflow.



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-OAEN - 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.

The screenshot shows a software interface with a toolbar at the top. The toolbar includes icons for home, refresh, a dropdown menu showing '160AEN - NewGrade 7 to 9 School (L)', save, zoom in, zoom out, delete, print, and user profile. The print icon is highlighted with a red box. A dropdown menu is open from the print icon, listing: 'Go To BI Reporting Center', 'BI Reporting', 'PMWeb Reporting', and 'PMWeb Word'. Below the toolbar is a 'REPORTS PREVIEW' section with a sub-toolbar containing a close button, a document icon, a close button, a right arrow, and an eye icon. The document icon and the first close button are highlighted with a red box.

REPORT	RECORD TYPE	DEFAULT
SDA_Submittal_Item_Log	Submittal Items	✓
Submittal Items Log	Submittal Items	
1		

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

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 screenshot displays the software interface. On the left is a vertical navigation menu with categories: PLANNING, PROJECT FORMS (highlighted with a red arrow), COST MANAGEMENT, SCHEDULING, ASSET MANAGEMEN..., WORKFLOW, PORTFOLIO, TOOLBOX, and EXIT. The 'PROJECT FORMS' category is expanded, showing a list of items: Safety Forms, RFIs, 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. At the top right of this menu is a 'CUSTOM FORMS' section with 'Permit' listed. The main area shows the 'Submittal Sets Manager View'. It features a search bar with 'Delivery Me*ALL*' and a 'Projects' dropdown menu showing '5240-N10-16-0AEN - 160AEN - Ne'. A red box highlights the '+' button in the toolbar. Below the toolbar is a table with the following columns: PROJECT NAME, SDA NUMBER, RECORD #, DESCRIPTION, WORKFLOW STATUS, TO CONTACT, FROM CONTACT, and REFERENCE. Each column has a filter icon.

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.

The screenshot shows a software interface with a toolbar at the top. The toolbar contains several icons: a menu icon, a refresh icon, a dropdown menu, a save icon, a plus sign icon (highlighted with a red box), a trash icon, an envelope icon, a printer icon, and a user icon. Below the toolbar, the word "MAIN" is displayed in orange. The main form area contains the following fields:

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		

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**.

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
<input type="text"/>										

No records to display.

PAGE SIZE

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**.

<input type="checkbox"/>	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 vs	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 vs	Dobco, Inc.	No Action			HU-0029-B01	
<input checked="" type="checkbox"/>	312319-004	First floor	D-B-B						

PAGE SIZE

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
<input type="text"/>										
	1	(0)	312319-004				First floor	D-B-B	1	

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.

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

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

Once completed, 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#

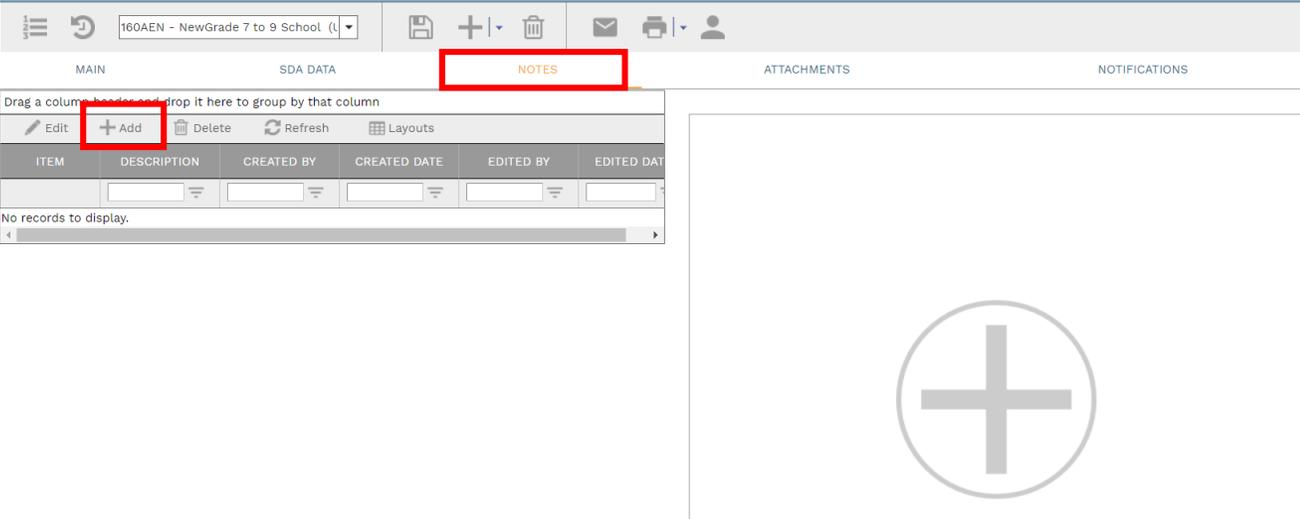
Workflow Status Draft

Transmittals

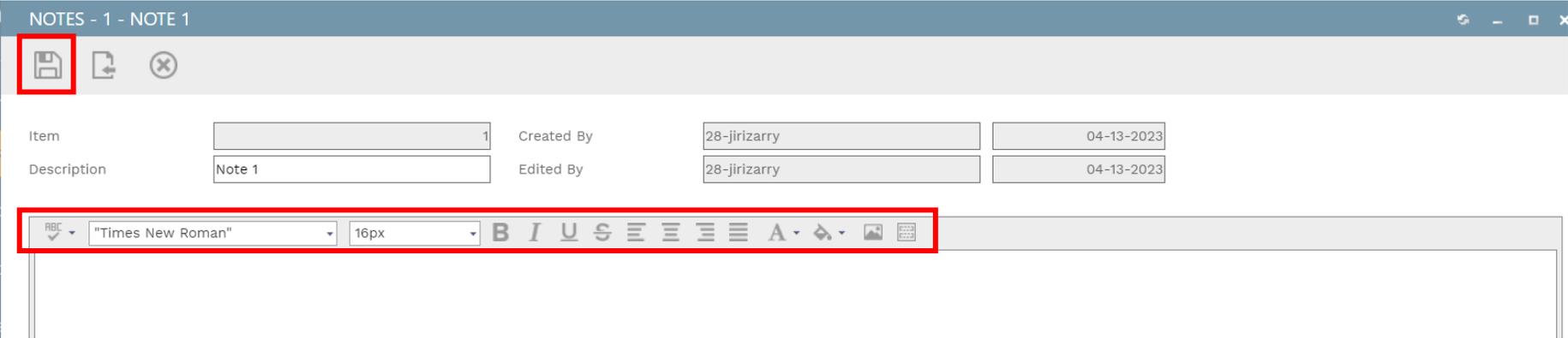
Date	To	Via
07-15-2020	New Jersey Schools Development	

Page Size 5

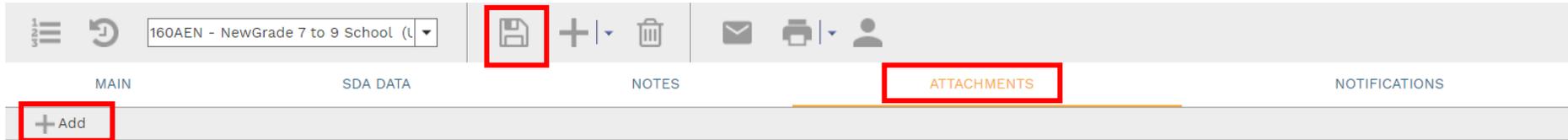
Click **Add** on the **Notes tab** to add additional notes as needed.



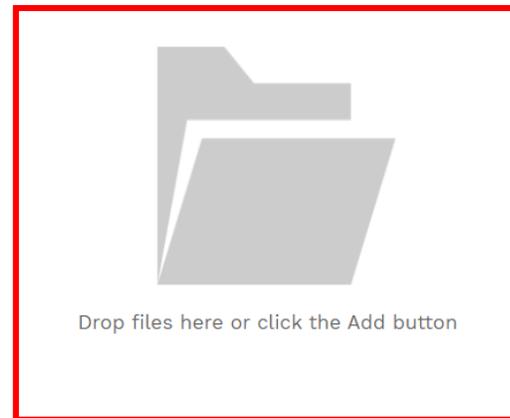
Enter your notes in the field provided. The text can be formatted using the toolbar shown. There is no limit to the amount of text you can enter. Click the **Save** button when completed.



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.

The screenshot shows the top navigation bar of the software. A red box highlights the print icon (a printer symbol) and the dropdown menu that appears when it is clicked. The dropdown menu contains the following options: "Go To BI Reporting Center", "BI Reporting", "PMWeb Reporting", "PMWeb Word", and "BI Reporting". Below the navigation bar, there are tabs for "MAIN", "SDA DATA", "NOTES", "ATTACHMENTS", "COLLABORATE", and "NOTIFICATIONS". A toolbar below the tabs includes "Edit", "Add", "Delete", "Refresh", and "Layouts".

REPORTS PREVIEW

REPORT	RECORD TYPE	DEFAULT
Submittal Set Details	Submittal Sets	
Submittal Sets	Submittal Sets	
Submittals Not Returned	Submittal Sets	
Submittals Not Submitted	Submittal Sets	✓
1		



The screenshot shows an email notification from PMWeb. The header includes the PMWeb logo and the date "05-22-2023". The recipient is "Hossam Ibrahim" at "Dobco, Inc.", with the address "One Geoffrey Way, Wayne, NJ 07470". The subject is "RE: Overdue Items for 160AEN - NewGrade 7 to 9 School (Union City) 5240-N10-16-0AEN". The body text states: "To Whom it May Concern : Our records indicate that the following submittal items are presently overdue. Please submit these items promptly according to your contractual obligations. Any further delay in your submission of these documents may delay the project and may subject your firm to backcharges or claims." Below the text is a table with the following data:

Submittal ID	Item Description	Due From Date	Sent Date	Return Due Date
60139	Initial Milestone Schedule	02-20-2023		
60144	Design SOV	08-31-2022		
60146	Existing Conditions Photos (DB A S.14-1)	02-21-2023		
60156	Temporary Construction & Support Facilities Plan	10-24-2022		
60419	312319-001 UC 7-9 school Dewatering	01-26-2023		

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