

Submittal Packages

A submittal package is a group of one or more submittal items.

Creating a New Submittal Package

1. Navigate to the Submittal Package log within a project.
2. Click the **New Package** button on top of the Submittal Package log.

Submittal Items shared with me

Buttons: New Item, **New Package**, Print

Items Packages

Show Latest Revisions Only

| Item # | Subject | Revision | Revision Date | Reviewer Action | Closed | Created On | Shared |
|--|-----------------|-------------------------|---------------|-----------------|--------------------------|-----------------|--------|
| Specification Section: Electrical | | | | | | | |
| <input type="checkbox"/> | Electrical-01.0 | Wiring Diagram | 0 | | <input type="checkbox"/> | 4/25/19 4:38 PM | 1 |
| <input type="checkbox"/> | Electrical-01.1 | Wiring Diagram | 1 | | <input type="checkbox"/> | 4/25/19 5:15 PM | 1 |
| <input type="checkbox"/> | Electrical-02.0 | Electrical Project Data | 0 | | <input type="checkbox"/> | 4/25/19 4:38 PM | 1 |
| <input type="checkbox"/> | Electrical-03.0 | Raceways | 0 | | <input type="checkbox"/> | 4/25/19 4:38 PM | 1 |

3. Enter a title for the submittal package in the **Subject** field. This is a required field and will need to be populated to save the record.

Subject * Required

Type the Subject

4. Double-click inside the **Specification Section** field and select the specification to apply to the submittal package. This is a required field and will need to be populated to save the record.

Specification Section * Required

Note: Refer to the QRGs for Specifications and Specification Packages for more information on how to set up the project specifications.

5. Enter a **Number** for the submittal package. This is a required field and will need to be populated to save the record.

Number * Required

Type the Number

6. The **Revision No** field will automatically populate with 0 for the first revision of the submittal package. If new revisions of the submittal package are created, the Revision No field will update with the next sequential number. There is no need to update this field unless the submittal package revision number is different from the one entered.

Revision

0

7. Enter the **Description** for the submittal package document.

Description

Type the Description

8. To add Submittals to the package, click the **Add Existing** button if the Submittal records already exist in ProjectTeam.

Submittal Items

| Item # | Subject | Revision Date | Attachments | Reviewer Action | Action Notes | Closed |
|--------|---------|---------------|-------------|-----------------|--------------|--------|
|--------|---------|---------------|-------------|-----------------|--------------|--------|

Click the **checkbox** beside the title of each Submittal to add to the package and click the **Add** button.

Add Existing Submittal Items

Search...

| Item # | Subject | Revision Date | Attachments | Reviewer Action | Action Notes | Closed |
|-------------------------------------|-----------------|---------------|-------------|-----------------|--------------|--------------------------|
| <input checked="" type="checkbox"/> | Electrical-01.1 | | 0 | | | <input type="checkbox"/> |
| <input checked="" type="checkbox"/> | Electrical-03.0 | | 0 | | | <input type="checkbox"/> |
| <input checked="" type="checkbox"/> | Electrical-02.0 | | 0 | | | <input type="checkbox"/> |
| <input type="checkbox"/> | Electrical-01.0 | | 0 | | | <input type="checkbox"/> |

If a submittal does not exist in ProjectTeam, click the **Create New** button.

Submittal Items

| Item # | Subject | Revision Date | Attachments | Reviewer Action | Action Notes | Closed |
|--------|---------|---------------|-------------|-----------------|--------------|--------|
|--------|---------|---------------|-------------|-----------------|--------------|--------|

Fill in the submittal fields and click the **Save** button.

The 'Create New' form contains the following fields:

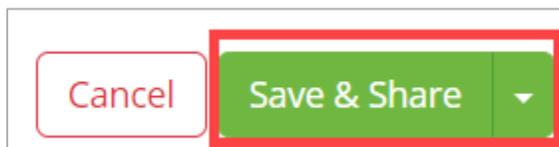
- Subject**: * Required (Text input: Type the Subject)
- Division**: (Dropdown menu)
- Specification #**: * Required (Text input: Type the Specification #)
- Revision #**: (Text input: 0)
- Revision Date**: (Text input)
- Discipline**: (Dropdown menu)
- Design Business**: (Text input)
- Design Contact**: (Text input)

Buttons at the bottom: Cancel, Save & New, and Save (highlighted).

9. The Submittal Package form will show all of the Submittal records added to the package.

| Item # | Subject | Revision Date | Attachments | Reviewer Action | Action Notes | Closed |
|-----------------|-------------------------|---------------|-------------|-----------------|-----------------------|--------------------------|
| Electrical-01.1 | Wiring Diagram | | 0 | | Type the Action Notes | <input type="checkbox"/> |
| Electrical-02.0 | Electrical Project Data | | 0 | | Type the Action Notes | <input type="checkbox"/> |
| Electrical-01.0 | Wiring Diagram | | 0 | | Type the Action Notes | <input type="checkbox"/> |

10. When you are ready to save the Submittal Package, click the **Save & Share** button. This will allow you to save the document and send it to other members of your project.

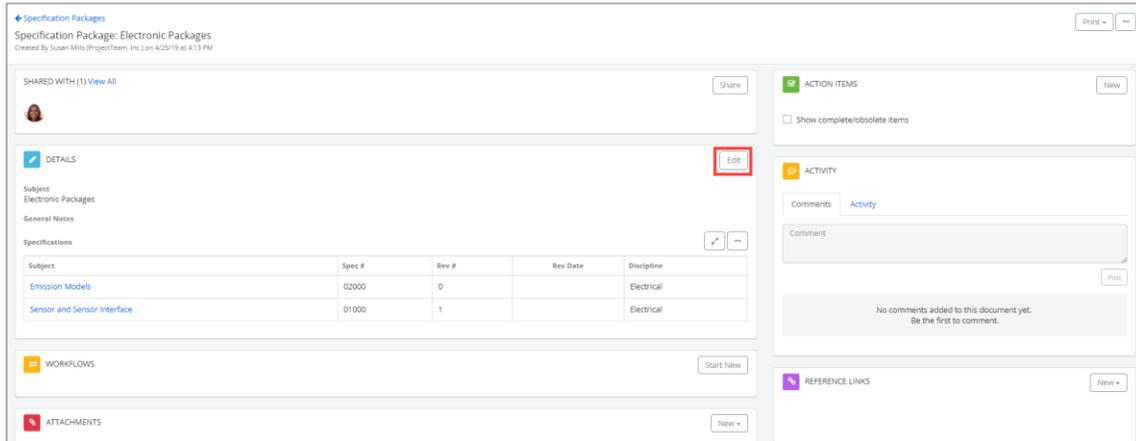


Editing a Submittal Package

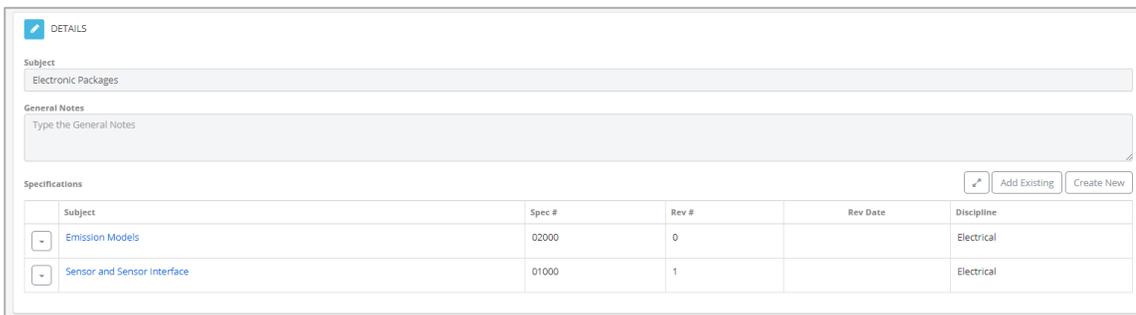
1. Navigate to the Submittal Package in the Submittal Package log and click the **Submittal Package title** to open the document.



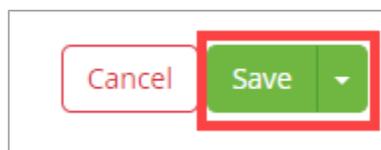
2. Click the **Edit** button in the Details section.



3. Update all fields you wish to change.

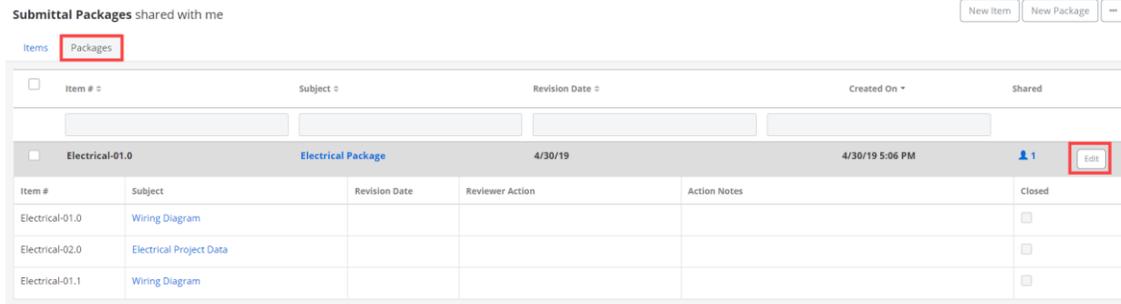


4. When all changes are complete, click the **Save** button.

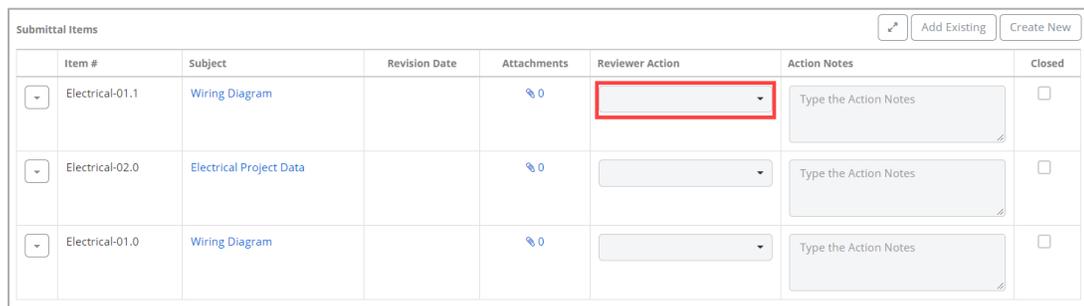


Add a Reviewer Action

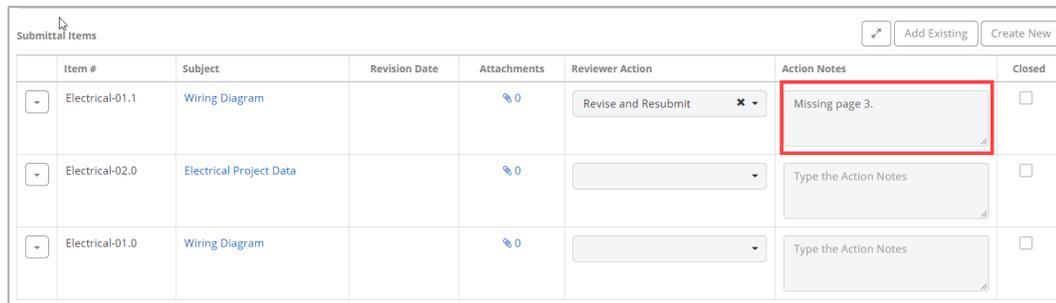
1. Open the Submittal log and click **the Submittal Packages** tab. Click the **Edit** button for the package to be reviewed.



- The Submittal Package Details page will open. Scroll to the bottom of the page to review the submittal items for the package. For each submittal item in the package, click the **Reviewer Action dropdown arrow** and select the appropriate action.



- Enter additional information in the **Action Notes** field.



- Complete steps 1-3 for each submittal item in the package. Click the **Save** button in the top right corner to save the actions.

Edit Submittal Package Cancel Save

Revision Date
04/30/2019

Description
Type the Description

Submittal Items Add Existing Create New

| Item # | Subject | Revision Date | Attachments | Reviewer Action | Action Notes | Closed |
|-----------------|-------------------------|---------------|-------------|---------------------|-----------------------|--------------------------|
| Electrical-01.1 | Wiring Diagram | | 0 | Revise and Resubmit | Missing page 3. | <input type="checkbox"/> |
| Electrical-02.0 | Electrical Project Data | | 0 | | Type the Action Notes | <input type="checkbox"/> |
| Electrical-01.0 | Wiring Diagram | | 0 | | Type the Action Notes | <input type="checkbox"/> |