

Reviewing and Acting on Submittals

A typical submittal consists of multiple items such as Product Data, Shop Drawings, Color Charts, and Installer Qualifications. Each of those records needs to be entered in ProjectTeam as a Submittal Item for the project. The individual submittal items that make up the submittal requirements outlined in each specification section are then grouped together and submitted for review and action as a single **Submittal Package** for the specification section that they apply to via workflow in ProjectTeam.

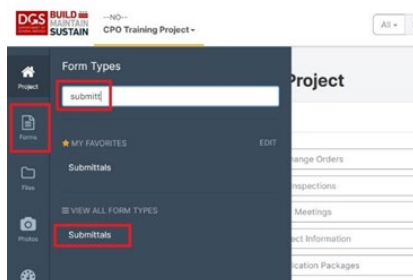
Submittal reviewers will receive email notifications that the Submittal Packages workflow has been assigned to them when submittal packages are submitted for review and action.

Reviewers should access the submittal records in ProjectTeam when submittal notifications are received and review the contents of the submittals. Once the review is complete, the reviewer's actions should be recorded in the applicable records in ProjectTeam by the appropriate reviewers.

NOTE: Submittal review and action is generally the responsibility of the Architect or Engineer of Record on a project. Occasionally, there is no Architect or Engineer of Record on a project and the DGS Project Manager, or their designee, performs the review and acts on the submittals. Submittal review and action should only be performed and recorded in the project record by designated responsible and qualified personnel on a project.

Add a Reviewer Action

1. Navigate to **Submittals** under **Forms** from within a project.



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

Submittal Packages shared with me

Items

Packages

Item # ▾

Subject ▾

Revision Date ▾

Created On ▾

Shared

Electrical-01.0

Electrical Package

4/30/19

4/30/19 5:06 PM

1

Edit

Item #

Subject

Revision Date

Reviewer Action

Action Notes

Closed

Electrical-01.0

Wiring Diagram

Electrical-02.0

Electrical Project Data

Electrical-01.1

Wiring Diagram

- 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.

Submittal Items

✓ Add Existing Create New

	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"/>

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

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 x	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"/>

- 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 x	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"/>