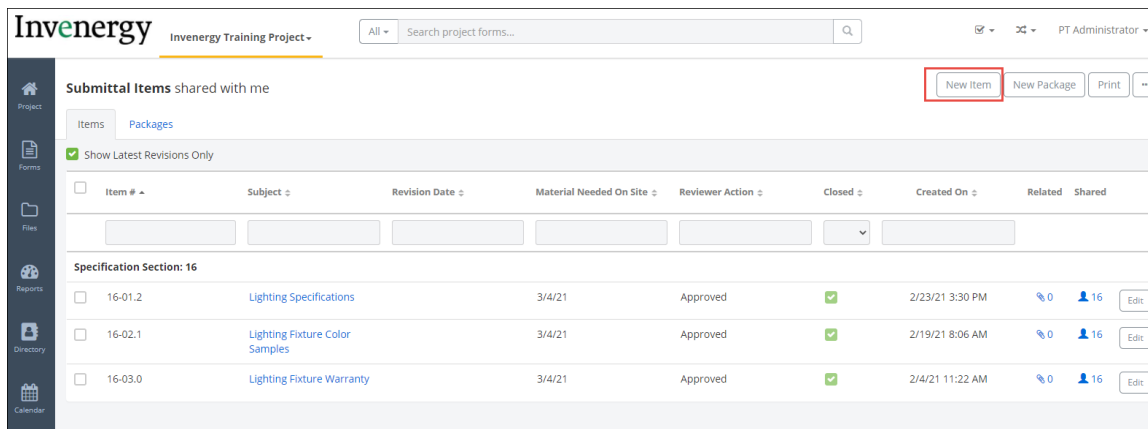


Submittal Items

Creating a New Submittal Item

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



The screenshot shows the 'Invenergy Training Project' interface. At the top right, there are buttons for 'New Item', 'New Package', and 'Print'. The 'New Item' button is highlighted with a red box. Below the buttons is a table of submittal items. The table has columns for Item #, Subject, Revision Date, Material Needed On Site, Reviewer Action, Closed, Created On, and Related. The table contains three rows of data, all with a status of 'Approved' and a 'Closed' checkbox that is checked.

Item #	Subject	Revision Date	Material Needed On Site	Reviewer Action	Closed	Created On	Related	Shared
16-01.2	Lighting Specifications	3/4/21		Approved	<input checked="" type="checkbox"/>	2/23/21 3:30 PM	0	16
16-02.1	Lighting Fixture Color Samples	3/4/21		Approved	<input checked="" type="checkbox"/>	2/19/21 8:06 AM	0	16
16-03.0	Lighting Fixture Warranty	3/4/21		Approved	<input checked="" type="checkbox"/>	2/4/21 11:22 AM	0	16

3. Fill in the fields of the Submittal form. Required fields are noted with *Required. These fields will need to be filled out in order to save the document.



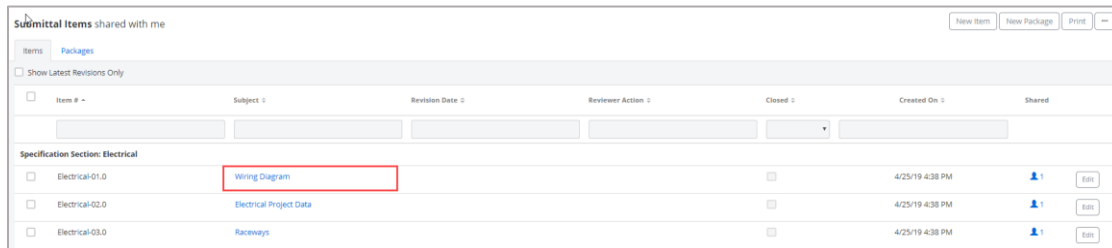
The screenshot shows the 'DETAILS' form for creating a new submittal item. The form includes the following fields:

- Subject**: * Required (Type the Subject)
- Specification Section**: * Required
- Number**: * Required (Type the Number)
- Revision**: 0
- Revision Date**
- Material Needed On Site**
- Description**: Type the Description
- Reviewer Action**: A dropdown menu.
- Action Notes**: Type the Action Notes
- Closed**: ☐

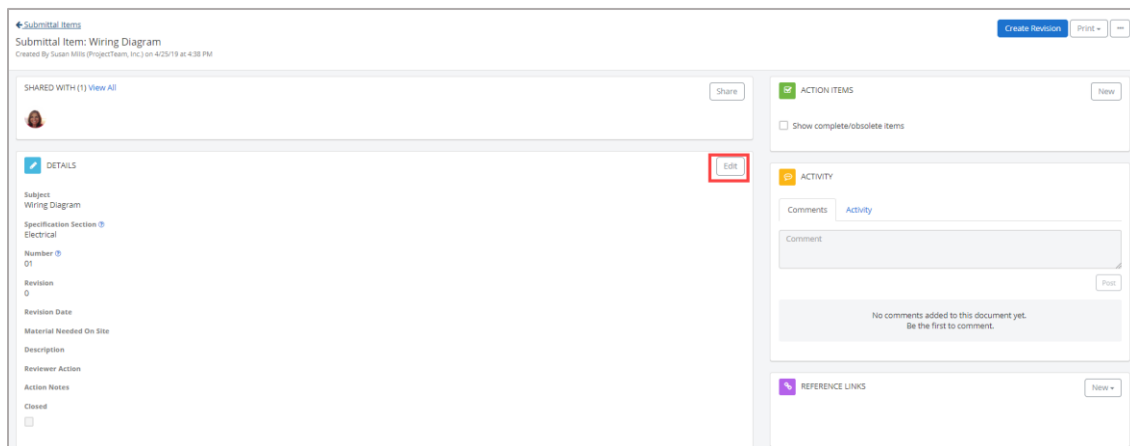
4. When you are ready to save the Submittal, click the **Save** button.

Editing a Submittal

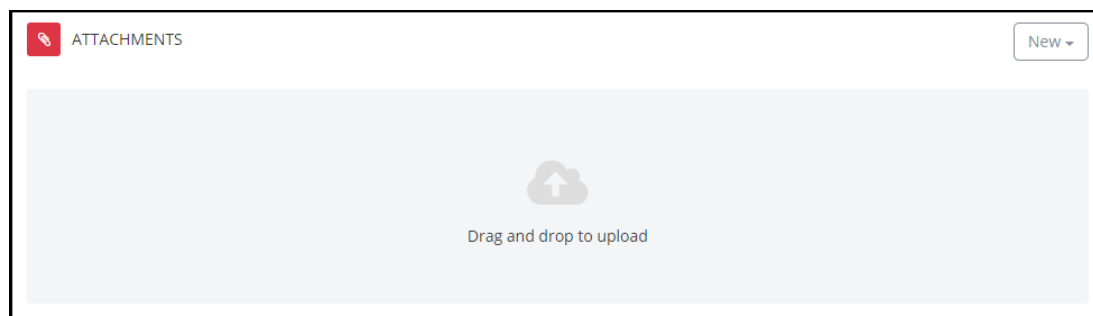
1. Navigate to the Submittal in the Submittal Items log and click the **Submittal subject** to open the document.



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



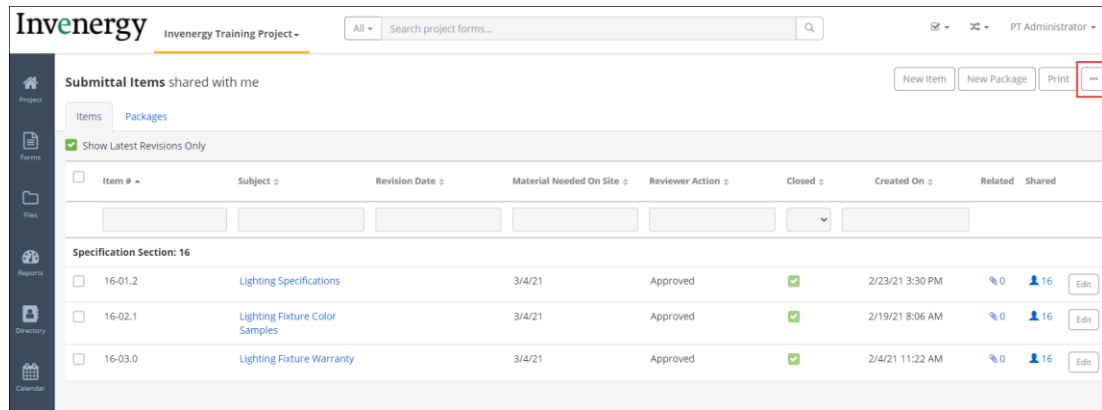
3. Update all fields you wish to change.
4. Drag and drop files as needed to the Attachments pane of the Submittal Item.



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

Batch Importing Submittal Items

1. Navigate to the Submittals log within a project.
2. Click on the elypse (...) button in the top right corner of the log.



3. Click **Batch Import** and follow the three steps outlined in the wizard.