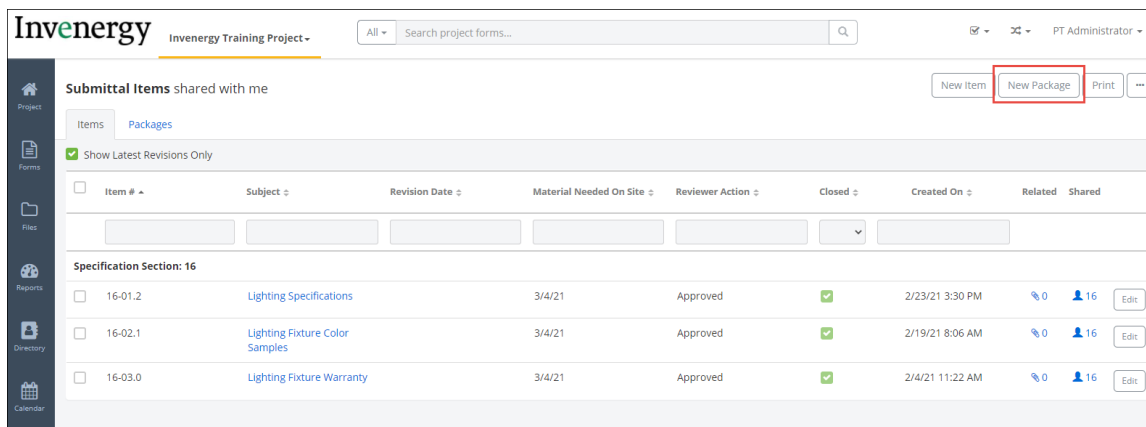


Submittal Packages

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

Creating a New Submittal Package

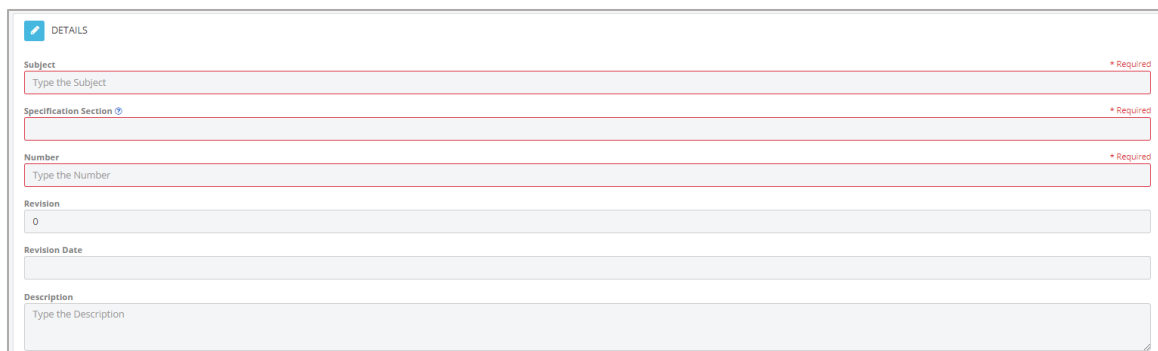
1. Navigate to the Submittal log within a project.
2. Click the **New Package** button on top of the Submittal Package log.



The screenshot shows the 'Invenenergy' interface for the 'Invenenergy Training Project'. The 'Submittal Items' section is active, displaying a table of items. The 'New Package' button is highlighted with a red box.

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

3. Fill in the appropriate fields of the Submittal Package 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 package. Required fields are highlighted in red:

- Subject (Type the Subject)
- Specification Section (Type the Specification Section)
- Number (Type the Number)

Other fields include Revision (0), Revision Date, and Description (Type the Description).

4. To add Submittals to the package, click the **Add Existing** button.



The screenshot shows the 'Submittal Items' table with the 'Add Existing' button highlighted in red.

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

- Click the **checkbox** beside the title of each Submittal to add to the package by clicking the **Add** button.

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

- The Submittal Package form will show all of the Submittal Items added to the package.

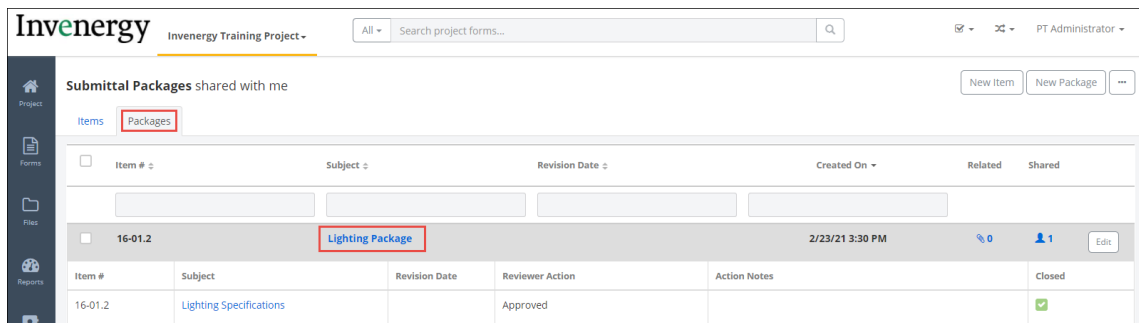
Item #	Subject	Revision Date	Attachments	Reviewer Action	Action Notes	Closed
Electrical-01.1	Wiring Diagram		0		Type the Action Notes	<input type="checkbox"/>
Electrical-02.0	Electrical Project Data		0		Type the Action Notes	<input type="checkbox"/>
Electrical-01.0	Wiring Diagram		0		Type the Action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

- When you are ready to save the Submittal Package, click the **Save** button.
- In the workflow pane, click **Start New**, select the appropriate workflow, and click **Start Workflow**.

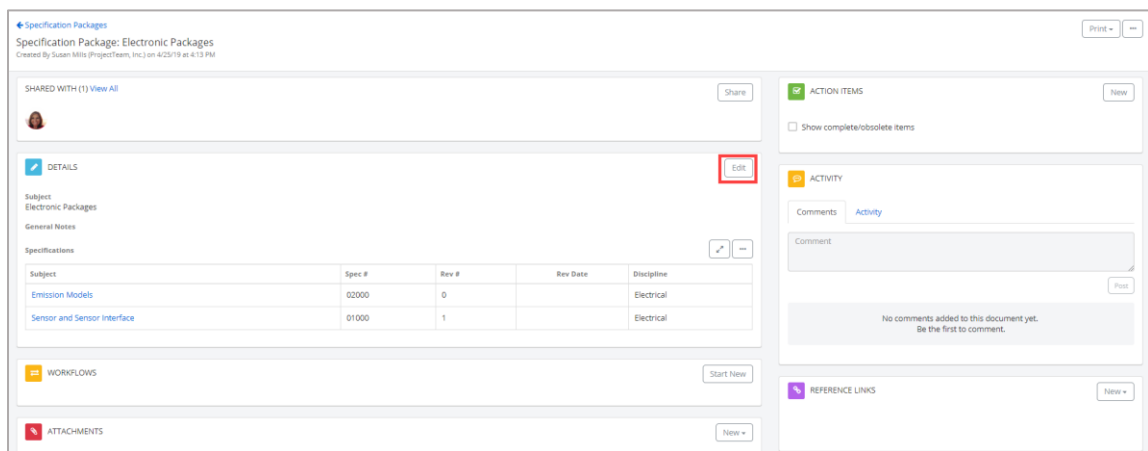
Workflow Name	Description
<input checked="" type="checkbox"/> (Electrical) Submittal Workflow	Utilize this workflow to send a Submittal Package to the Engineer of Record.

Editing a Submittal Package

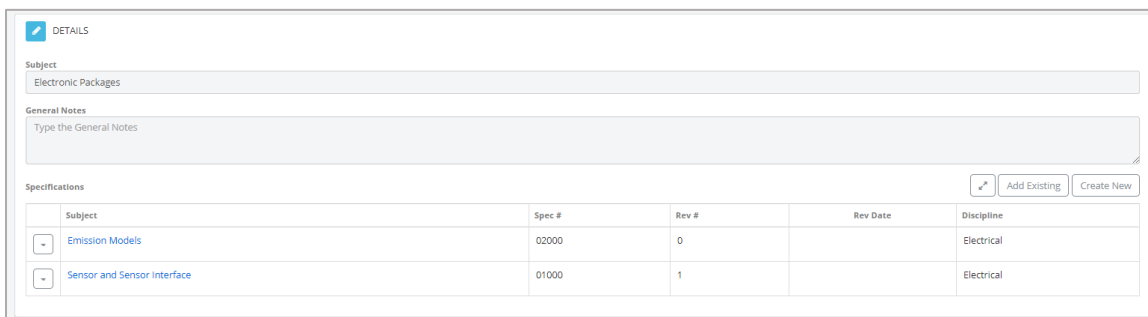
1. Navigate to the Submittal log within a project.
2. Click on the **Packages** tab, then open the appropriate Submittal Package by clicking on the **Subject** in the gray header of the package.



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



4. Update all fields you wish to change.



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

Reviewing a Submittal Package

1. Open the Submittal Package from the email notification, workflow log, or submittal package log.
2. 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 **Subject** in blue text to review the submittal information.

Submittal Items							
	Item #	Subject	Revision Date	Reviewer Action	Action Notes	Closed	Attachments
<input type="checkbox"/>	16-03.0	Lighting Fixture Warranty		Approved <input type="checkbox"/>	Type the Action Notes	<input checked="" type="checkbox"/>	0
<input type="checkbox"/>	16-02.0	Lighting Fixture Color Samples		Revise and Submit <input type="checkbox"/>	Type the Action Notes	<input type="checkbox"/>	0
<input type="checkbox"/>	16-01.0	Lighting Specifications		Rejected as Noted <input type="checkbox"/>	Type the Action Notes	<input type="checkbox"/>	0

3. Once reviewed, return to the submittal package and choose the appropriate **Reviewer Action** from the picklist.

Submittal Items							
	Item #	Subject	Revision Date	Reviewer Action	Action Notes	Closed	Attachments
<input type="checkbox"/>	16-03.0	Lighting Fixture Warranty		Approved <input type="checkbox"/>	Type the Action Notes	<input checked="" type="checkbox"/>	0
<input type="checkbox"/>	16-02.0	Lighting Fixture Color Samples		Revise and Submit <input type="checkbox"/>	Type the Action Notes	<input type="checkbox"/>	0
<input type="checkbox"/>	16-01.0	Lighting Specifications		Rejected as Noted <input type="checkbox"/>	Type the Action Notes	<input type="checkbox"/>	0

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

Submittal Items							
	Item #	Subject	Revision Date	Reviewer Action	Action Notes	Closed	Attachments
<input type="checkbox"/>	16-03.0	Lighting Fixture Warranty		Approved <input type="checkbox"/>	Type the Action Notes	<input checked="" type="checkbox"/>	0
<input type="checkbox"/>	16-02.0	Lighting Fixture Color Samples		Revise and Submit <input type="checkbox"/>	Provide additional color options.	<input type="checkbox"/>	0
<input type="checkbox"/>	16-01.0	Lighting Specifications		Rejected as Noted <input type="checkbox"/>	Wrong fixture type.	<input type="checkbox"/>	0

5. Check the Closed box for submittals that are Approved or Approved as Noted.

Submittal Items								Add Existing	Create New
	Item #	Subject	Revision Date	Reviewer Action	Action Notes	Closed	Attachments		
	16-03.0	Lighting Fixture Warranty		Approved	Type the Action Notes	<input checked="" type="checkbox"/>	0		
	16-02.0	Lighting Fixture Color Samples		Revise and Submit	Provide additional color options.	<input type="checkbox"/>	0		
	16-01.0	Lighting Specifications		Rejected as Noted	Wrong fixture type.	<input type="checkbox"/>	0		

6. Complete steps 2-5 for each submittal item in the package. Click the **Save** button in the top right corner to save the actions.
7. When all items are complete **Pass** the workflow to the next step.

Submittals from Powin

Your action

☒ **Pass**
Mark as "Passed" and move forward to the next step

☐ **Cancel**
Mark as "Cancelled" and stop the workflow

Notes

Notes

Cancel

Take Action

Creating a Revision to a Submittal Package

1. Open the Submittal Package that needs revised.
2. Click **Create Revision** in the top right corner of the Submittal Package.

The screenshot shows the 'Submittal Packages' interface. At the top, there's a header with 'Submittal Packages' and a 'Create Revision' button highlighted with a red box. Below the header, the package name 'Submittal Package: Lighting Package' is displayed, along with its creation details. The main area is divided into two columns. The left column contains a 'DETAILS' section with fields for Subject, Specification Section, Number, Revision, Revision Date, and Description. The right column contains an 'ACTION ITEMS' section with a 'Show complete/obsolete items' checkbox and an 'ACTIVITY' section with a 'Comments' tab and a 'Post' button. A 'Share' button is located in the top right of the left column, and an 'Edit' button is in the top right of the details section.

3. Confirm that the open Submittal Items in the package will be versioned as well by clicking **Yes**.

The screenshot shows a dialog box titled 'New Package Revision?'. The text inside reads: 'Creating a new submittal package will create revisions for each submittal item in the package that has not been marked "Closed"'. At the bottom, there are two buttons: 'No, nevermind' and 'Yes'. The 'Yes' button is highlighted with a red box.

- Note that the Revision number has been auto incremented, make changes as needed to the Submittal Package fields, and click **Save**.

New Submittal Package Revision

Cancel Save

DETAILS

Subject
Lighting Package

Specification Section ⓘ
16

Number
01

Revision
4

Revision Date

Description
Type the Description

- Update the new versions of the Submittal Items attached to the Submittal Package as required. See Submittal Item QRG for more information.
- In the workflow pane, click **Start New**, select the appropriate workflow, and click **Start Workflow**.

Start new workflow

Search...

Workflow Name	Description
<input checked="" type="checkbox"/> (Electrical) Submittal Workflow	Utilize this workflow to send a Submittal Package to the Engineer of Record.

Cancel Start Workflow