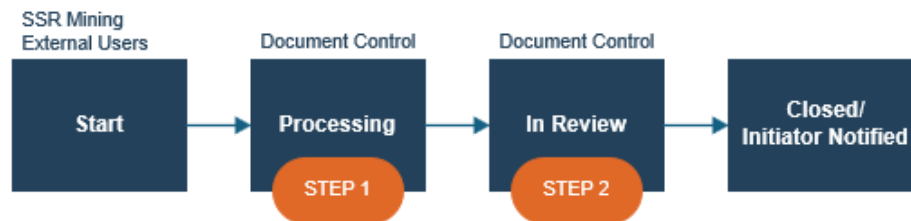


# PROCESS SUBMITTALS

In ProjectTeam, submittals are separated into **Items** and **Packages**. Both are accessed from the same “Submittals” form.

A registry can be set up in **Submittal Items** or you can add each one individually. After the record is created, the submittal document should be uploaded to the **Attachment** panel of the Item record.

Submittal Items are grouped into a **Package** and submitted via workflow. External users and SSR users have access to start the **Submittal Package Review Workflow**. Step 1 of the workflow goes to **Document Control** for review. The passed step keeps the workflow (Step 2) in **Document Control**’s court with instructions to start the applicable Engineering Review workflow(s) and wait for response(s) before passing Step 2. When Step 2 is passed, the initiator receives an email notification.



To navigate this Quick Reference Guide, simply scroll down, or use the following hyperlinks to jump to a specific section.

[Create Submittal Items](#)

[Batch Import a Submittal Registry](#)

[Create an Individual Submittal Item](#)

[Attach the Submittal Document](#)

[Create Submittal Packages](#)

[Start Submittal Package Workflow](#)

[Revisions](#)

[Review the Submittal Package and Items \(Document Control\)](#)

[Start Engineering Review Workflow \(Document Control\)](#)

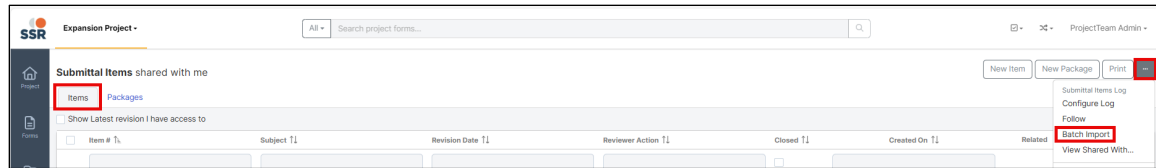
[Review Engineering Review Response and Return to Initiator \(Document Control\)](#)

[Related Resources](#)

## CREATE SUBMITTAL ITEMS

### BATCH IMPORT A SUBMITTAL REGISTRY:

- 1) Select Batch Import from the 3-dot ellipsis in the Submittal Item log view.



- Download** the template.
- Open the downloaded **.csv** file.
- For each Item, all applicable data in the .csv.
  - Picklist field entries must exactly match one of the available options in the form.
 

**\*\*Exception: For the **Specification Section**, enter only the number.**
- Save** the .csv file.
- Return to the Batch Import wizard and click **Upload**.
- Find and select the .csv file from the file explorer modal.
- \*\*See the Batch Import QRG or [Batch Import Records](#) for additional help.**

### CREATE AN INDIVIDUAL SUBMITTAL ITEM:

- Click **New Item** from the Submittal log view to open the New Submittal Item form.

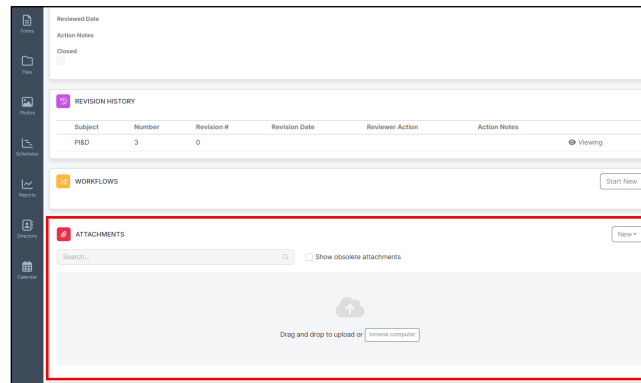


- Enter the **Subject**.
- Select **Specification Section**.
- Enter the **Number**.
- Enter data to all other applicable fields.
- Save** the form.



## ATTACH THE SUBMITTAL DOCUMENT

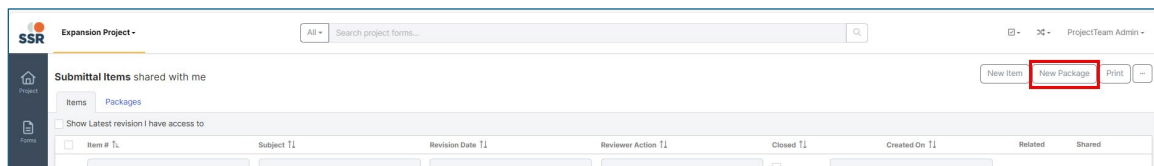
- 2) Once the record is created, the file(s) to be submitted can be uploaded to the Attachments panel at the bottom of the Item record at any time.



The screenshot shows the ProjectTeam interface with a sidebar on the left. The main content area has several panels: 'REVISION HISTORY' with a table showing 3 revisions, 'WORKFLOWS' with a 'Start New' button, and 'ATTACHMENTS' which is highlighted with a red box. The 'ATTACHMENTS' panel includes a search bar, a 'Show obsolete attachments' checkbox, and a large area for uploading files with a 'Drag and drop to upload or' prompt and a 'Browse computer' button.

## CREATE SUBMITTAL PACKAGE

- 3) Click **New Package** from the Submittal log view to open the New Submittal Package form.



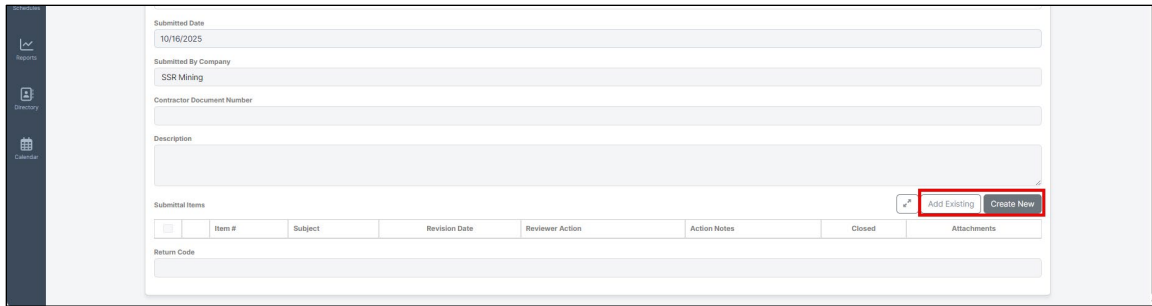
The screenshot shows the ProjectTeam interface with a sidebar on the left. The main content area has a 'Submittal Items shared with me' section with a table of items. Above the table, there are buttons for 'New Item', 'New Package' (highlighted with a red box), and 'Print'.

- a) Enter the required and other applicable **Details** fields.



The screenshot shows the ProjectTeam interface with a sidebar on the left. The main content area has a 'New Submittal Package' form. The 'DETAILS' section is highlighted, showing fields for 'Subject' and 'Reagents'. There are 'Cancel' and 'Save & Start Workflow' buttons at the top right of the form.

- b) Add **Submittal Items** to the collection. You can select from the list of existing Submittal Items or create new Items directly from the Package.



Submitted Date  
10/16/2025

Submitted By Company  
SSR Mining

Contractor Document Number

Description

Submit Item

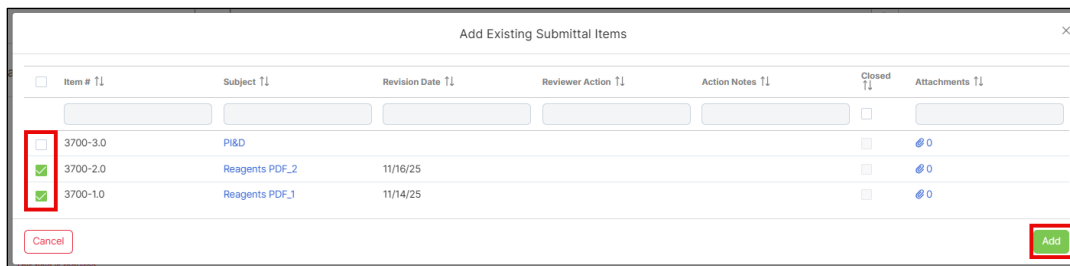
Item # Subject Revision Date Reviewer Action Action Notes Closed Attachments

Return Code

Add Existing Create New

i) **Add Existing:**

- (1) **Select** one or more of the existing Items and **Add**.



Add Existing Submittal Items

Item #	Subject	Revision Date	Reviewer Action	Action Notes	Closed	Attachments
<input type="checkbox"/> 3700-3.0	PI&D				<input type="checkbox"/>	0
<input checked="" type="checkbox"/> 3700-2.0	Reagents PDF_2	11/16/25			<input type="checkbox"/>	0
<input checked="" type="checkbox"/> 3700-1.0	Reagents PDF_1	11/14/25			<input type="checkbox"/>	0


Cancel Add

ii) **Create New:**

- (a) Enter required and all other applicable field data.  
(b) **Save** the Item.

**NOTE:** You will need to return to the Item record and upload the attachment once the Package is saved.

- c) Enter data to all other applicable fields in the Package.  
d) **Save & Start Workflow.**



Expansion Project

All Search project forms...

New Submittal Package

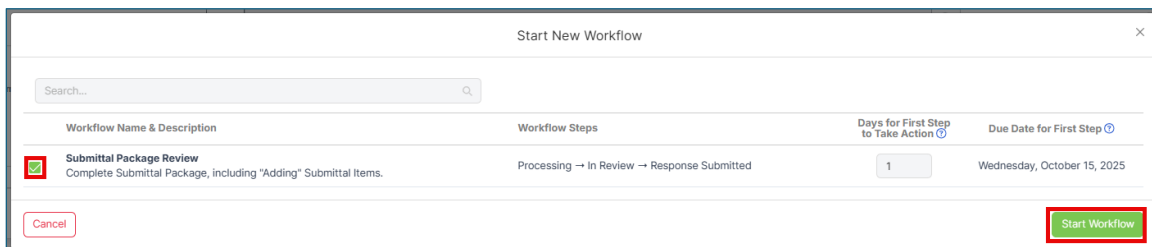
01

Revision

0

Cancel Save & Start Workflow

- i) Select the **Submittal Package Review** workflow from the Start new Workflow modal.  
ii) **Start Workflow.**



Start New Workflow

Search...

Workflow Name & Description	Workflow Steps	Days for First Step to Take Action	Due Date for First Step
<input checked="" type="checkbox"/> <b>Submittal Package Review</b> Complete Submittal Package, including "Adding" Submittal Items.	Processing → In Review → Response Submitted	1	Wednesday, October 15, 2025

Cancel Start Workflow

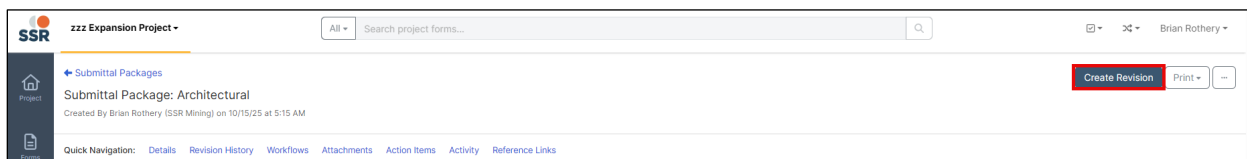
**NOTE:** Workflow can be started after a record is saved from the Workflows panel of the record.

- e) The initiator of the workflow will receive an email notification when the workflow is complete.

## REVISIONS

When a package **Revision** is created, the system will automatically create revisions to all Items in the Package that are **not Closed**.

- 4) From the open Package, click **Create Revision**.
  - a) Click Yes in the **New Package Revision?** modal to create a revised Package and revised Items in the package.
  - b) Update fields in the Package, as needed.
  - c) **Save** the record.
  - d) Open each **Submittal Item**, which is a new revision of that Item, and upload the revised files to the **Attachments** panel.
  - e) **Start the Workflow** from the Package.



## REVIEW THE SUBMITTAL PACKAGE AND ITEMS

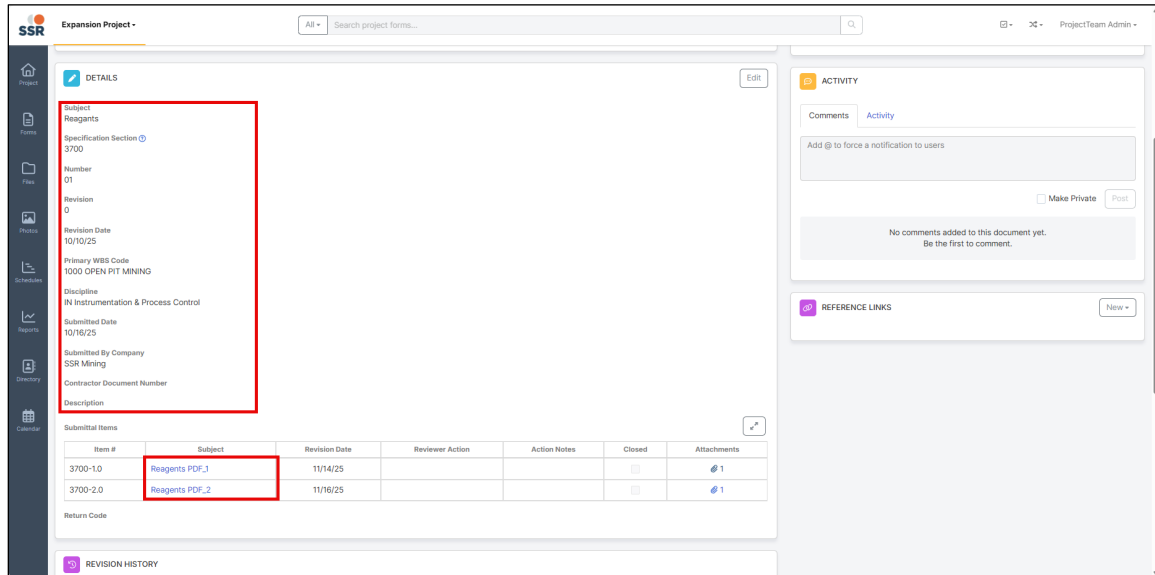
When the Submittal Review Workflow starts, Document Control will receive an email notification that workflow Step 1 is in their court. Document Control will review the Package and Items for completeness and compliance with construction specifications and documents.

- 1) The link in the email will open the Submittal Package or navigate to the Submittal Package from the log view.

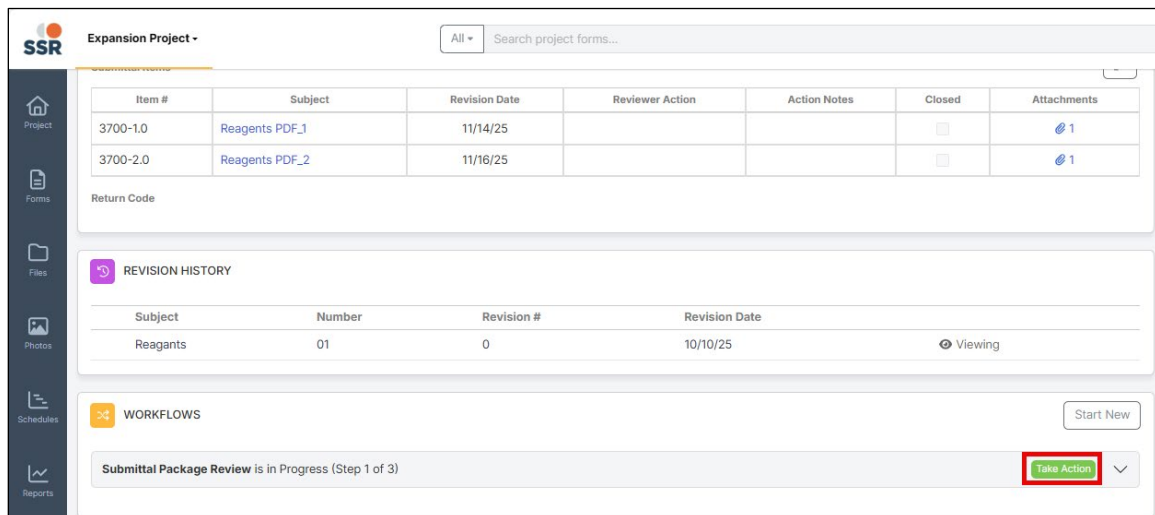
Submittal Packages shared with me				
Items		Packages		
Item #	Subject	Revision Date	Created On	
11003-01.0	Architectural		10/15/25 6:15 AM	
Item #	Subject	Revision Date	Reviewer Action	Action Notes
11003-01.0	Shop Drawings	10/15/25		
3700-01.0	Reagents	10/10/25		
			10/14/25 2:15 PM	

- 2) Review the **Details** in the Package.

- 3) Use the link to each **Submittal Item** to open and review the **Details and attached files**.
  - a. Add Markups, as needed. **\*\*See *Add markup annotations to a file* for additional help.**



- 4) Click **Take Action** from the top of the page or from the Workflow panel of the Package.



- 5) **Pass** the workflow step to move it to the Review step. Or **Fail** the step to Cancel the workflow and notify the initiator. Use **Notes** to justify the cancellation.
 

**\*\*Step 2 of the workflow remains in Document Control's court. Do not pass Step 2 until you have received the review response from the *Engineering Review Workflow*.**

×

⚠ You are taking action on **Step 1 (Processing)** for Submittal Package: Reagents.

1) Review Submittal Package and Submittal Items for completeness and compliance with construction specifications and documents. 2) If they are not compliant, Cancel the Workflow and include a detailed explanation in the Note field. 3) Otherwise, Pass to the workflow step.

Your action

☒ **Pass**  
 Mark as "Passed" and move forward to the next step (Step 2 - In Review).

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

Notes

Days for next step to take action: ?  
N/A

Due date for next step: ?  
N/A

Cancel

Take Action

## START ENGINEERING REVIEW WORKFLOW

- 6) **Document Control** will start the appropriate **Engineering Workflow** based on the discipline of the Package and wait for the response before Passing the Review step of the Submittal Package Review Workflow.
  - From the Workflow panel of the Submittal Package, click **Start New**.
  - Select** the appropriate engineer(s) to respond and **Start Workflow**.

×

Workflow Name & Description	Workflow Steps	Days for First Step to Take Action ?	Due Date for First Step ?
<input type="checkbox"/> <b>Civil Engineering Response</b> Utilized to forward an RFI or Submittal Package to Civil Engineering for a response.	Civil Engineering Response	6	Monday, October 20, 2025
<input type="checkbox"/> <b>Earthworks Engineering Response</b> Utilized to forward an RFI or Submittal Package to Earthworks Engineering for a response.	Earth Works Engineering Response	6	Monday, October 20, 2025
<input type="checkbox"/> <b>EIC Engineering Response</b> Utilized to forward an RFI or Submittal Package to EIC Engineering for a response.	EIC Engineering Response	6	Monday, October 20, 2025
<input checked="" type="checkbox"/> <b>Environmental Engineering Response</b> Utilized to forward an RFI or Submittal Package to Environmental Engineering for a response.	Environmental Engineering Response	6	Monday, October 20, 2025
<input type="checkbox"/> <b>Geotech Engineering Response</b> Utilized to forward an RFI or Submittal Package to Geotech Engineering for a response.	Geotech Engineering Response	6	Monday, October 20, 2025
<input type="checkbox"/> <b>Health &amp; Safety Engineering Response</b> Utilized to forward an RFI or Submittal Package to Health & Safety Engineering for a response.	Health & Safety Engineering Response	6	Monday, October 20, 2025
<input type="checkbox"/> <b>Process Plant Engineering Response</b> Utilized to forward an RFI or Submittal Package to Process Plant Engineering for a response.	Process Plant Engineering Response	6	Monday, October 20, 2025
<input type="checkbox"/> <b>SMP Engineering Team Response</b> Utilized to forward an RFI or Submittal Package to SMP Engineering for a response.	SMP Engineering Response	5	Sunday, October 19, 2025

Cancel

Start Workflow

c. You should see 2 active workflows.

WORKFLOWS

Start New

Environmental Engineering Response is in Progress (Step 1 of 1)

Submittal Package Review is in Progress (Step 2 of 3)

Take Action

## REVIEW ENGINEERING REVIEW RESPONSE AND RETURN TO INITIATOR

When the **Engineering Response Workflow** is passed by the engineer, Document Control is notified that the workflow is complete. **Document Control** will review the **Reviewer Actions**, **Action Notes**, and **Closed** checkboxes in the Submittal Items collection and **Pass** the workflow step.

- 1) The link in the email will open the Submittal Package.
- 2) Scroll down to the Submittal Items collection and review the **Reviewer Actions**, **Action Notes**, and **Closed** checkboxes.
- 3) Open and review any new or marked-up **Attachments**.
- 4) **Take Action** and **Pass** the workflow step to notify the Initiator of the response.

SSR

Expansion Project

All

Search project forms...

Project

Forms

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Calendar

Submittal Items

Item #	Subject	Revision Date	Reviewer Action	Action Notes	Closed	Attachments
3700-1.0	<a href="#">Reagents PDF_1</a>	11/14/25	Accepted as Noted	Approved.	<input checked="" type="checkbox"/>	<a href="#">1</a>
3700-2.0	<a href="#">Reagents PDF_2</a>	11/16/25	Revise and Resubmit	Not enough information provided.	<input type="checkbox"/>	<a href="#">1</a>

Return Code

REVISION HISTORY

Subject	Number	Revision #	Revision Date
Reagents	01	0	10/10/25

Viewing

WORKFLOWS

Start New

Environmental Engineering Response is Done

Restart

Submittal Package Review is in Progress (Step 3 of 3)

Take Action

ATTACHMENTS

New



## RELATED RESOURCES

### Help Pages:

[Submittal Item Overview](#)

[Batch Import Records](#)

[Adding Attachments to Forms](#)

### Related QRGs:

Submitting Submittals

Engineering Submittal Review