

CREATE SUBMITTALS

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

A **Submittal 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.

Items are grouped into a **Package** and submitted for review. 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. Step 3 returns the Package back to the workflow Initiator. The initiator must pass the step to confirm receipt and mark the workflow complete.

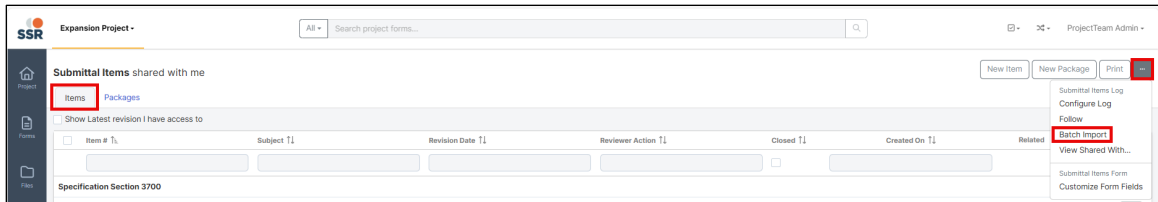


To navigate this Quick Reference Guide, simply scroll down, or use the following hyperlinks to jump to a specific section.

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- [Create an Individual Submittal Item](#)
- [Attach the Submittal Document](#)
- [Create Submittal Packages](#)
- [Start Submittal Package Workflow](#)
- [Revisions](#)

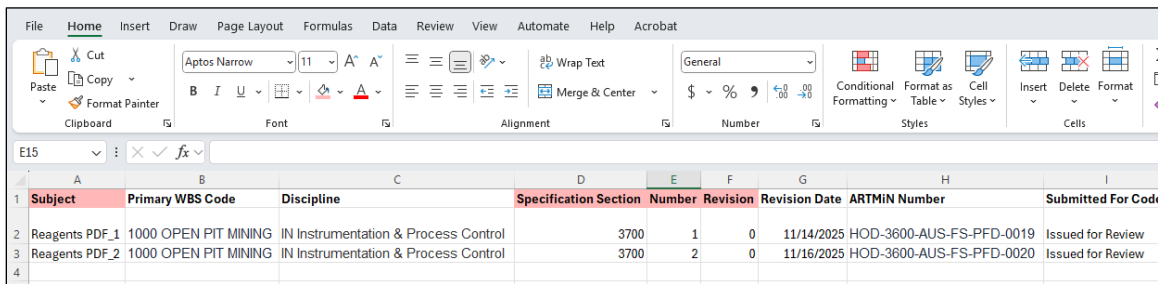
CREATE SUBMITTAL ITEMS

- 1) **Create a Submittal Registry:**
 - a. Select Batch Import from the 3-dot ellipsis in the Submittal Item log view.



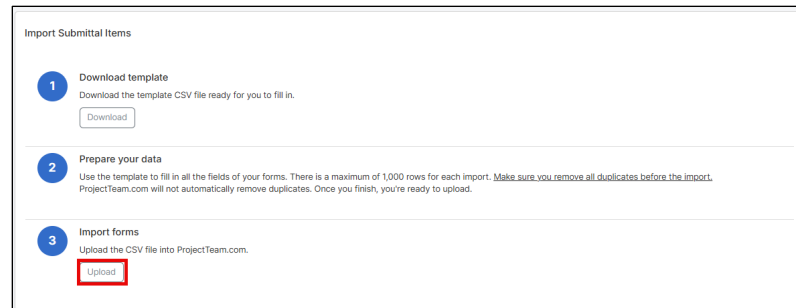
- 2) **Download** the template.
- 3) Open the downloaded **.csv** file.
- 4) For each Item, Enter the **Subject**, **Specification Section**, **Number**, **Revision**, and all other applicable data in the **.csv**.
 - i. Picklist field entries must exactly match one of the options available in the list.

****Exception: For the Specification Section, enter only the number.**



	Subject	Primary WBS Code	Discipline	Specification Section	Number	Revision	Revision Date	ARTMIN Number	Submitted For Code
2	Reagents PDF_1	1000 OPEN PIT MINING	IN Instrumentation & Process Control	3700	1	0	11/14/2025	HOD-3600-AUS-FS-PFD-0019	Issued for Review
3	Reagents PDF_2	1000 OPEN PIT MINING	IN Instrumentation & Process Control	3700	2	0	11/16/2025	HOD-3600-AUS-FS-PFD-0020	Issued for Review

- 5) **Save** the **.csv** file.
- 6) Return to the Batch Import wizard and click **Upload**.



Import Submittal Items

- Download template
Download the template CSV file ready for you to fill in.
[Download](#)
- Prepare your data
Use the template to fill in all the fields of your forms. There is a maximum of 1,000 rows for each import. *Make sure you remove all duplicates before the import.* ProjectTeam.com will not automatically remove duplicates. Once you finish, you're ready to upload.
- Import forms
Upload the CSV file into ProjectTeam.com.
[Upload](#)

- 7) Find and select the **.csv** file from the file explorer modal.

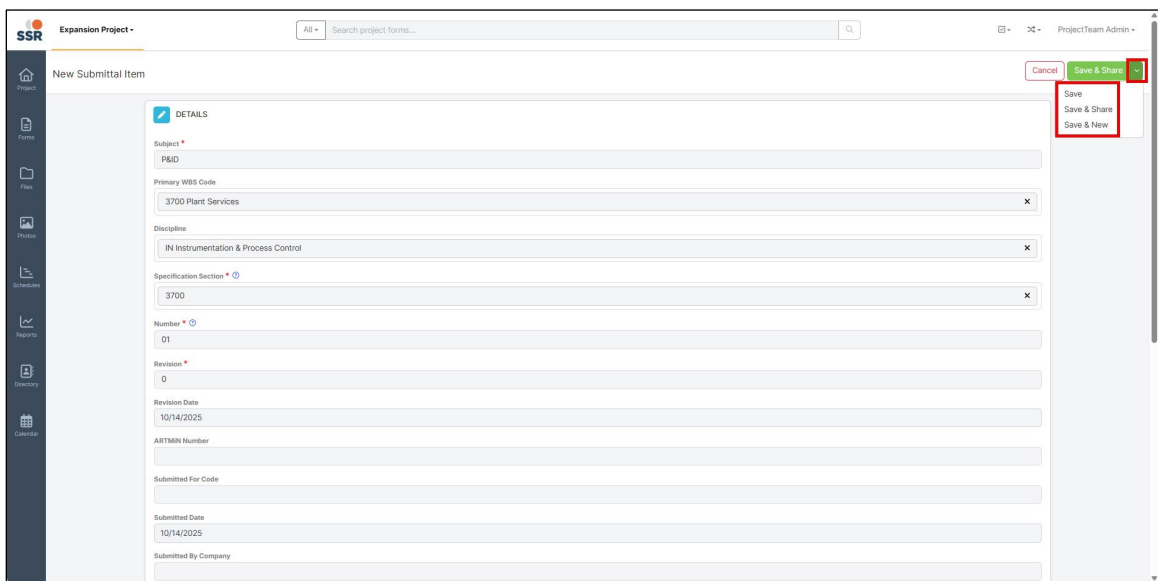
****See the Batch Import QRG or [Batch Import Records](#) for additional help.**

2) Create an individual Submittal Item:

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

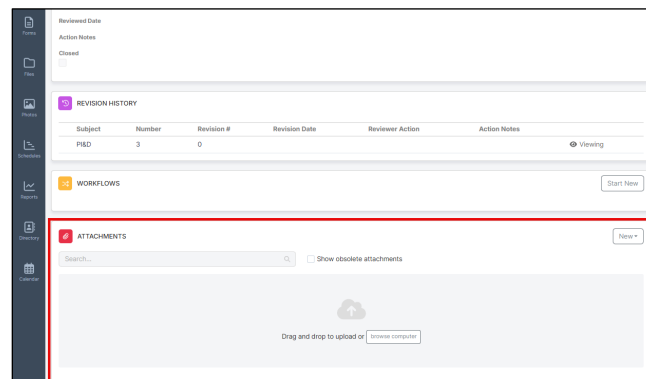


- i. Enter the **Subject**.
- ii. Select **Specification Section**.
- iii. Enter the **Number**.
- iv. Enter data to all other applicable fields.
- v. **Save** the form.



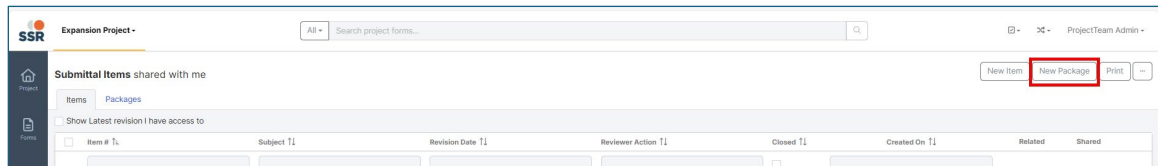
3) **Attach the Submittal Document:**

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.



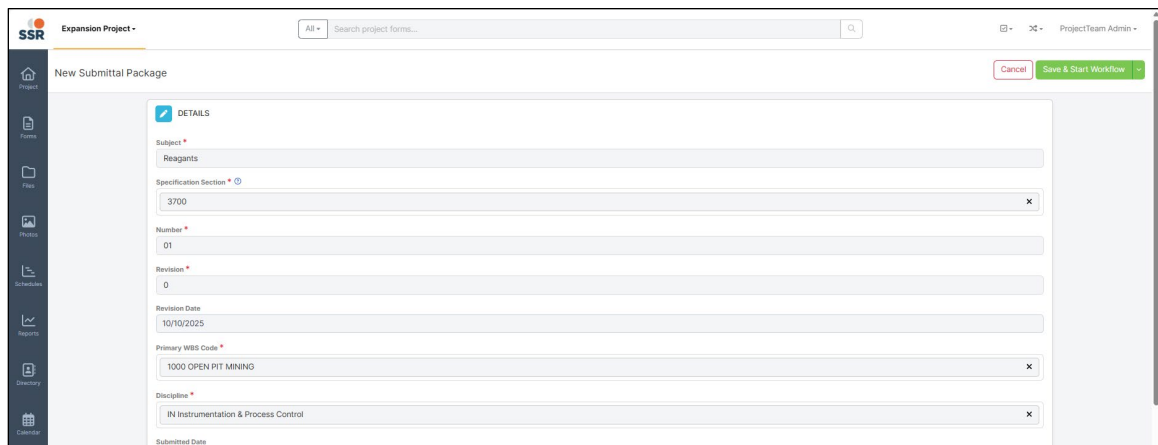
CREATE SUBMITTAL PACKAGE

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



The screenshot shows the 'Submittal Items shared with me' view. At the top right, there are buttons for 'New Item', 'New Package' (highlighted with a red box), 'Print', and a dropdown menu. Below the buttons is a table with columns: Item #, Subject, Revision Date, Reviewer Action, Closed, Created On, Related, and Shared.

- a. Enter the **Subject**.
- b. Select the **Specification Section**.
- c. Enter the **Number** and **Revision**.
- d. Select the **Primary WBS Code** and **Discipline**.

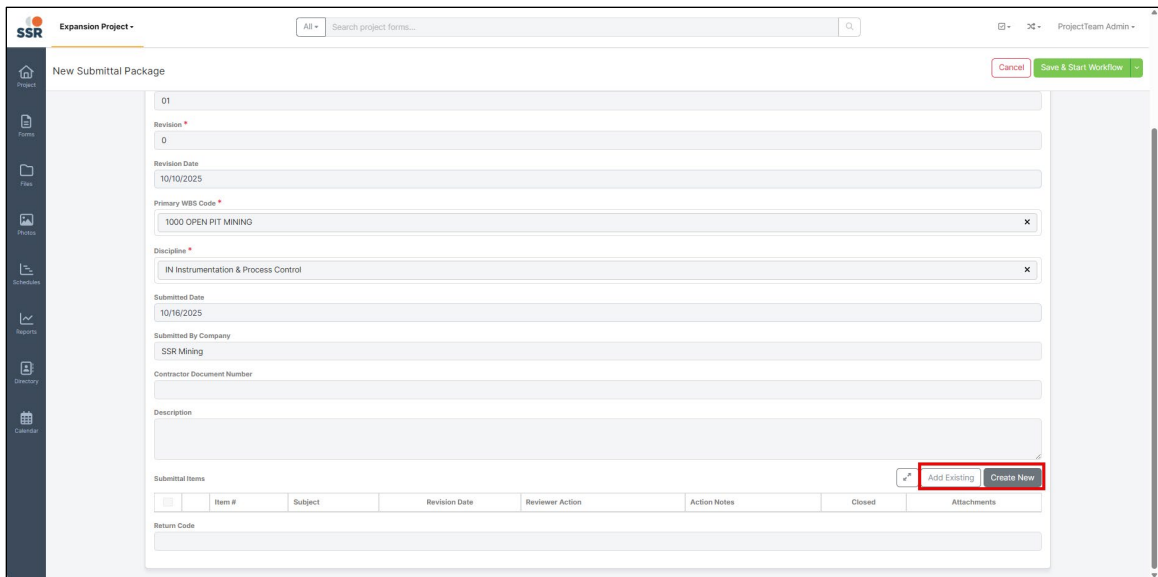


The screenshot shows the 'New Submittal Package' form. The form has a 'DETAILS' section with the following fields:

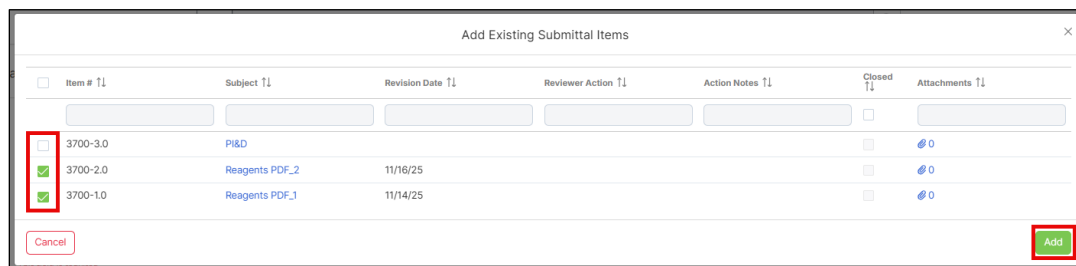
- Subject ***: Reagents
- Specification Section ***: 3700
- Number ***: 01
- Revision ***: 0
- Revision Date**: 10/10/2025
- Primary WBS Code ***: 1000 OPEN PIT MINING
- Discipline ***: IN Instrumentation & Process Control
- Submitted Date**: (empty)

At the top right of the form, there are 'Cancel' and 'Save & Start Workflow' buttons.

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

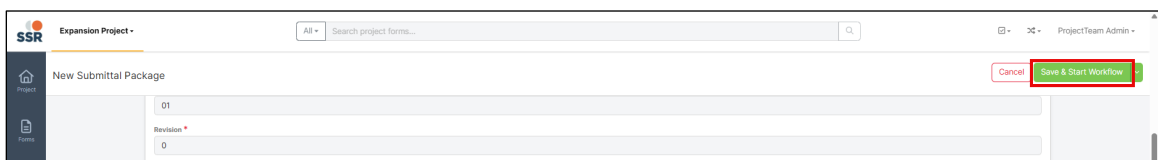


- i. Click **Add Existing** to open the list of Submittal Items.
 1. **Select** one or more of the existing Items and **Add**.

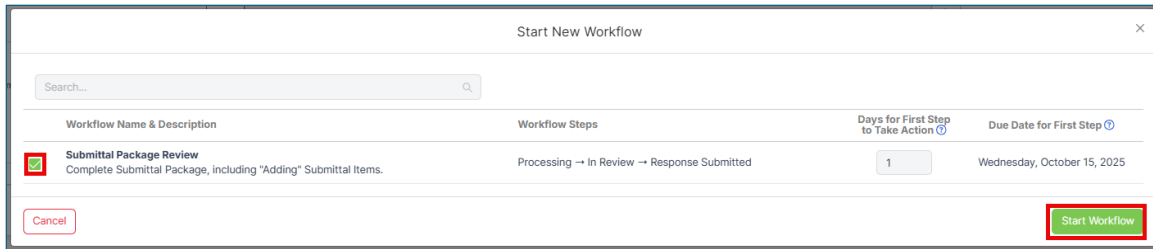


Item #	Subject	Revision Date	Reviewer Action	Action Notes	Closed	Attachments
☐ 3700-3.0	P&D				☐	0
☒ 3700-2.0	Reagents PDF_2	11/16/25			☐	0
☒ 3700-1.0	Reagents PDF_1	11/14/25			☐	0

- ii. Click **Create New** to open a new Submittal Item form.
 1. Enter required and all other applicable field data.
 2. **Save** the record.
 3. *You will need to return to the Item record and upload the attachment once the Package is saved.*
- f. Enter data to all other applicable fields.
- g. **Save & Start Workflow.**



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



Workflow Name & Description	Workflow Steps	Days for First Step to Take Action	Due Date for First Step
Submittal Package Review Complete Submittal Package, including "Adding" Submittal Items.	Processing → In Review → Response Submitted	1	Wednesday, October 15, 2025

- j. The initiator of the workflow will be assigned the final step of the workflow. Review the **Reviewer Action** and **Action Notes** for each Submittal Item. **Pass** the step to mark the workflow complete. **Fail** the workflow step to return the workflow to Document Control.

REVISIONS

If a package has been completed with items that are not yet **Closed**, because they were rejected, a revision to the package will need to be created. When a package revision is created, the system will automatically create revisions to all items in the package that are not closed. It is not necessary to create revisions to items individually.

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

RELATED RESOURCES

Help Pages:

[Submittal Item Overview](#)

[Batch Import Records](#)

[Adding Attachments to Forms](#)

Related QRGs:

Process Submittals

Engineering Submittal Review