Submittals

What Is The Submittals Feature?

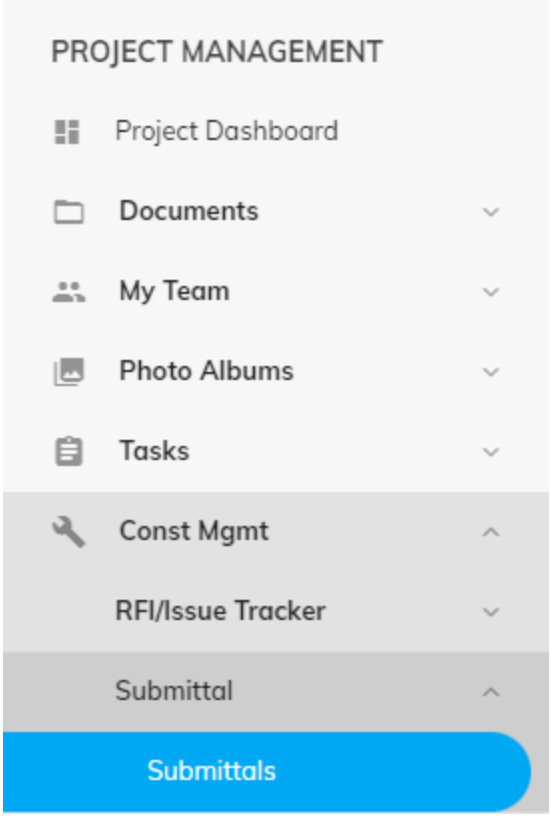
The Submittals tool manages the construction process where the contractor provides required information to the project team for review prior to these items' installation, fabrication, or use on the project. These items could include submit cut sheets, shop drawings, material safety data sheets, test reports, schedules and others. The architect or project manager will review the submittal to confirm that the information complies with the design/contract requirements of the project.

- Straightforward, easy-to-use form to send one or multiple submittals as a bundle
- Expedited review process where relevant parties are notified immediately through email and within the software.
- Easy for review parties to collaborate and review submittals, ensuring quicker average turnaround and getting responses to the contractor much more quickly.
- Intuitive workflow for the contractor to resubmit submittals that have been initially rejected by the review parties.
- Additional Submittal Register functionality to establish an initial list of required submittals within Projectmates.

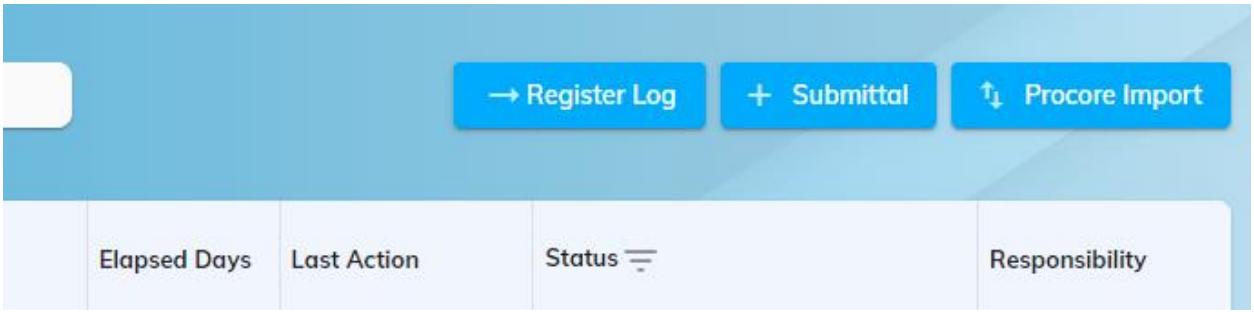
Creating A Submittal

To begin creating a Submittal, navigate into the project you want to create submittals for through the My Projects page.

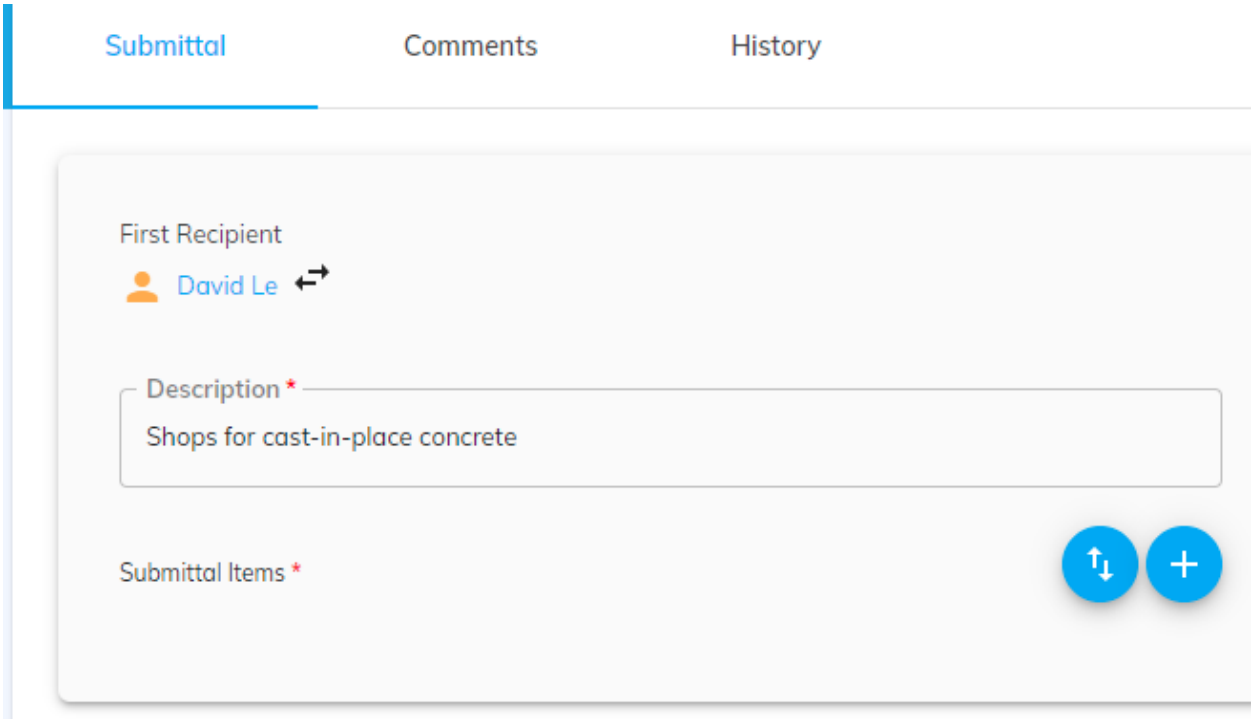
1. Once inside a project, the Submittals tool can typically be found on the left-side menu in **Construction Mgmt > Submittal.**



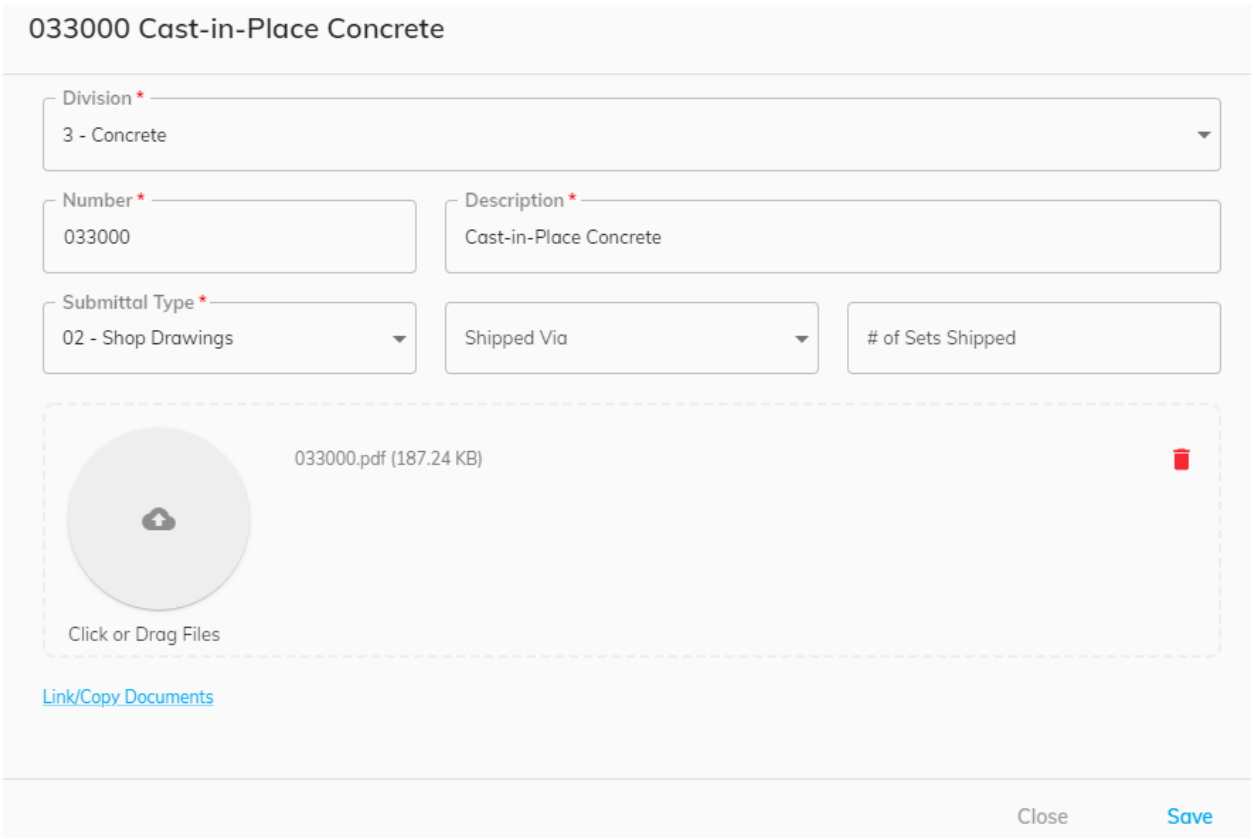
2. Once inside of the Submittal tool, click the **+ Submittal** button found on the upper right to begin creating a new Submittal.



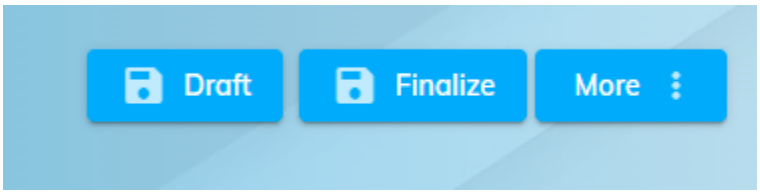
3. In the new submittal page, fill out the **Description** of the Submittal with a basic title or description of the submittal you are creating, then click the + button to begin detailing the contents of the submittal and uploading its files.



4. The pop-up window is where you can provide full details to the submittal you are creating. Fill out all mandatory fields, attach the relevant file(s), and then click Save.

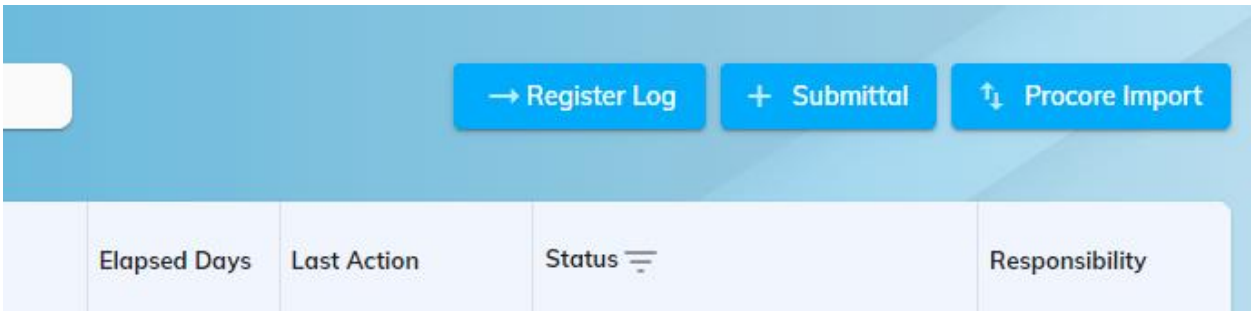


5. If you wish to submit multiple submittal items together for review, then the + button can be used repeatedly to create additional items.
6. Once the contents of the submittal are ready, click on the **Finalize** button on the upper right to send it out to be reviewed. Alternatively, you can click **Draft** to complete the Submittal later. Draft Submittals can be accessed from the Submittal log page.

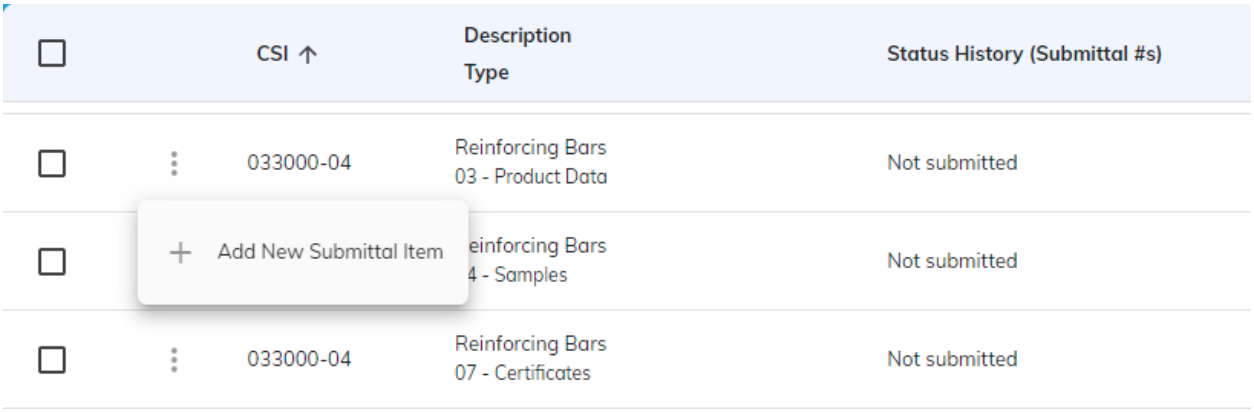


If a submittal register was established for this project, then there is a quicker, alternative way to create submittals.

1. Instead of clicking + Submittal, navigate to the submittal register by clicking **Register Log** on the upper right.



1. Any register items with a Status History of **Not submitted** can be submitted directly through the register. Click the triple dots icon next to an unsubmitted register item, and click **Add New Submittal Item**.

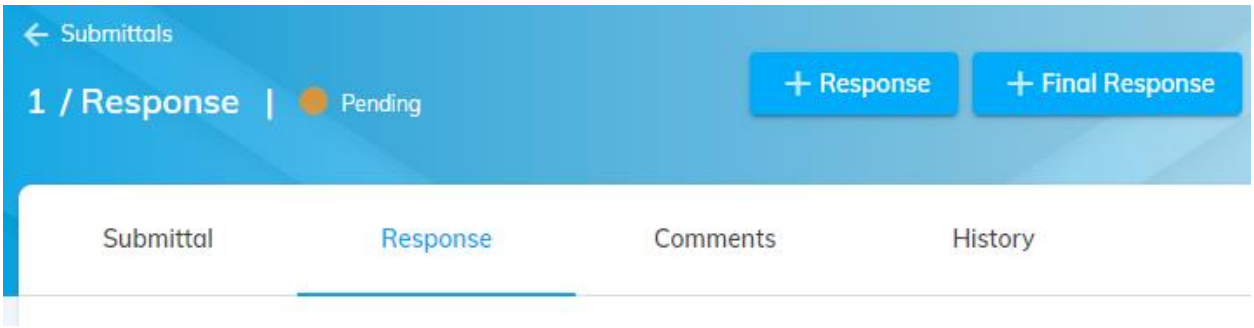


3. This will take you straight to a New Submittal page with a vast majority of the submittal contents already filled out. Simply attach the relevant files, click **Save**, and then click **Finalize** on the upper right of the page to send the submittal out to be reviewed.

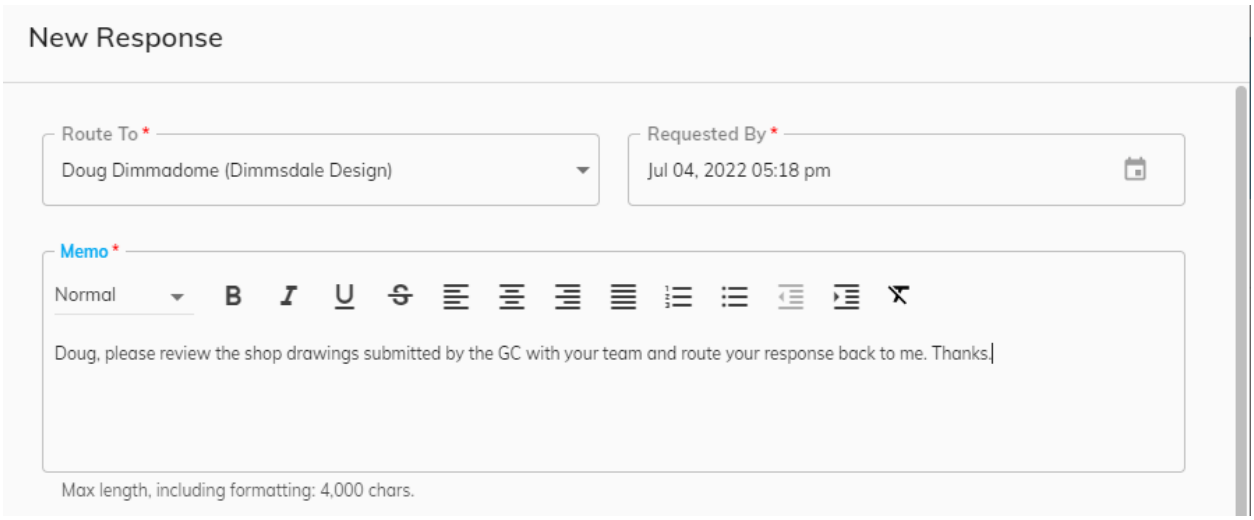
Route A Submittal

Routing a submittal will transfer it to a user's My Work page and designate them as the responsible party until they take action on it. It is the primary method for a team to have back-and-forth communication on a submittal without giving it a final response.

1. If you have the access rights to do so, then the **+ Response** button can be found on the upper right of a pending submittal after navigating to its **Response** tab—use this to route the submittal.



2. Choose which user to route the submittal to. This will transfer the submittal to their My Work page/Ball-in-Court, send them an email notification, and place them as the Responsibility user until it has been routed again or a final response has been given.
3. In the **Memo** field, provide instructions to the Route user as to why the submittal has been routed to them.

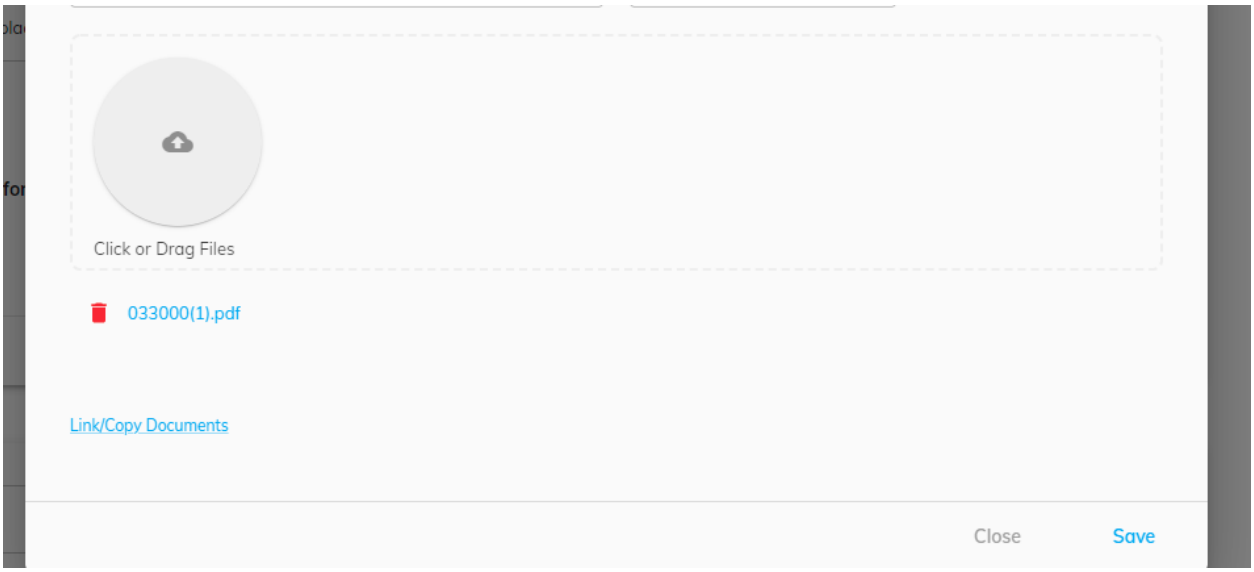


4. Add attachments that you believe will be helpful in the **Attachments** area (keep in mind that the routed user will be able to access the general contractor's submittal attachments).
5. CC anyone else you feel should be aware of your route in the **Select who you want to email**
6. Click **Save** to complete this action and route the submittal to the selected user.
7. Any routing actions taken by users can be reviewed again by accessing the Response tab.

Resubmittals

The creator of a rejected submittal has the ability to resubmit a submittal that was rejected.

1. The Resubmit button can be found in the Response tab of a closed Submittal.
2. When resubmitting, click on the Pencil (Edit Category) button next to a submittal item to revise its contents.
3. Use the red trashcan (Delete) button to remove any irrelevant/incorrect attachments, and then upload your new attachments.



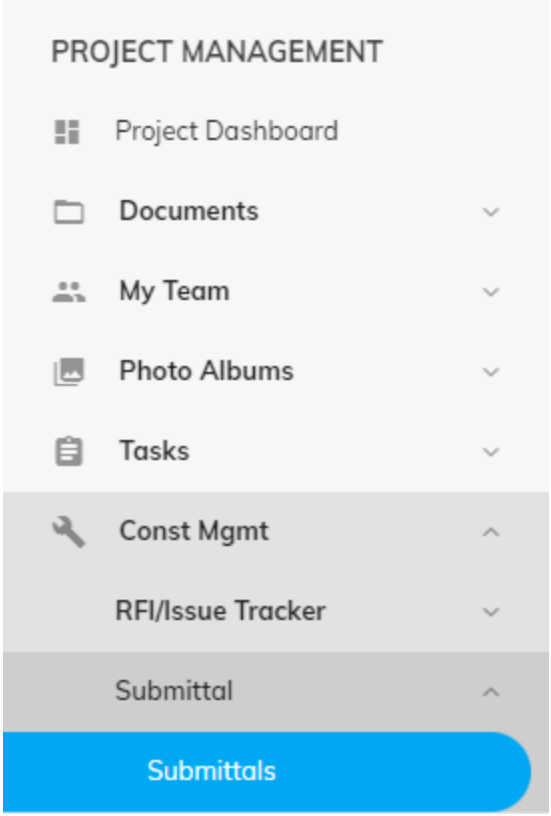
4. Click Save to save your revisions to the submittal item, then **Finalize** on the upper right to send it through for review once more.

Importing A Submittal Register

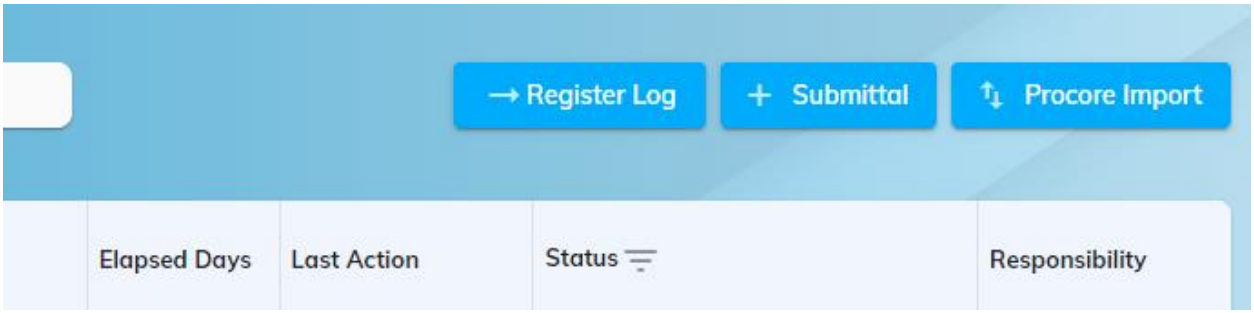
The Submittal Register is an optional feature to the Submittals tool that further streamlines the submittal process. It is a way for the project manager or architect to establish a predefined list of submittals. This also makes the process of creating a Submittal even simpler for the general contractor, as much of the data entry can be done within the initial register import.

Navigate into the project you want to import a register for through the **My Projects** page.

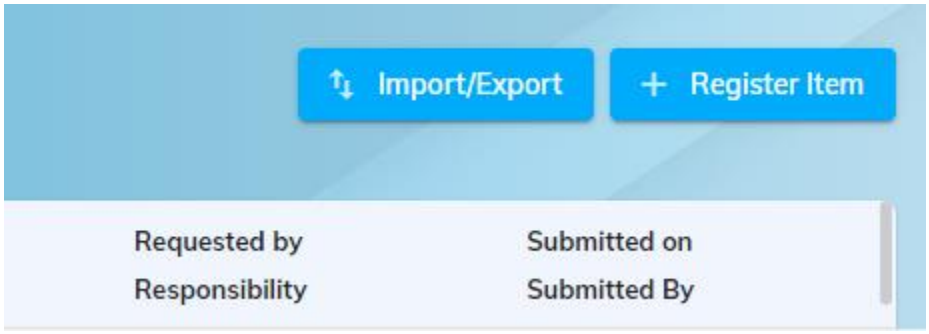
1. Once inside a project, the Submittals tool can typically be found on the left-side menu in **Construction Mgmt > Submittal.**



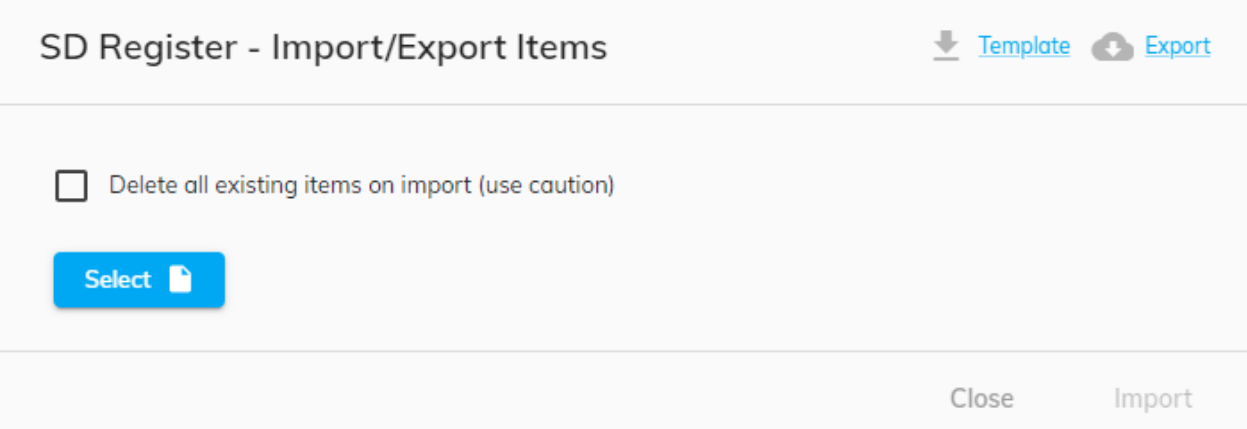
2. Once inside of the Submittal tool, click the **Register Log** button found on the upper right to navigate to the Submittal Register area.



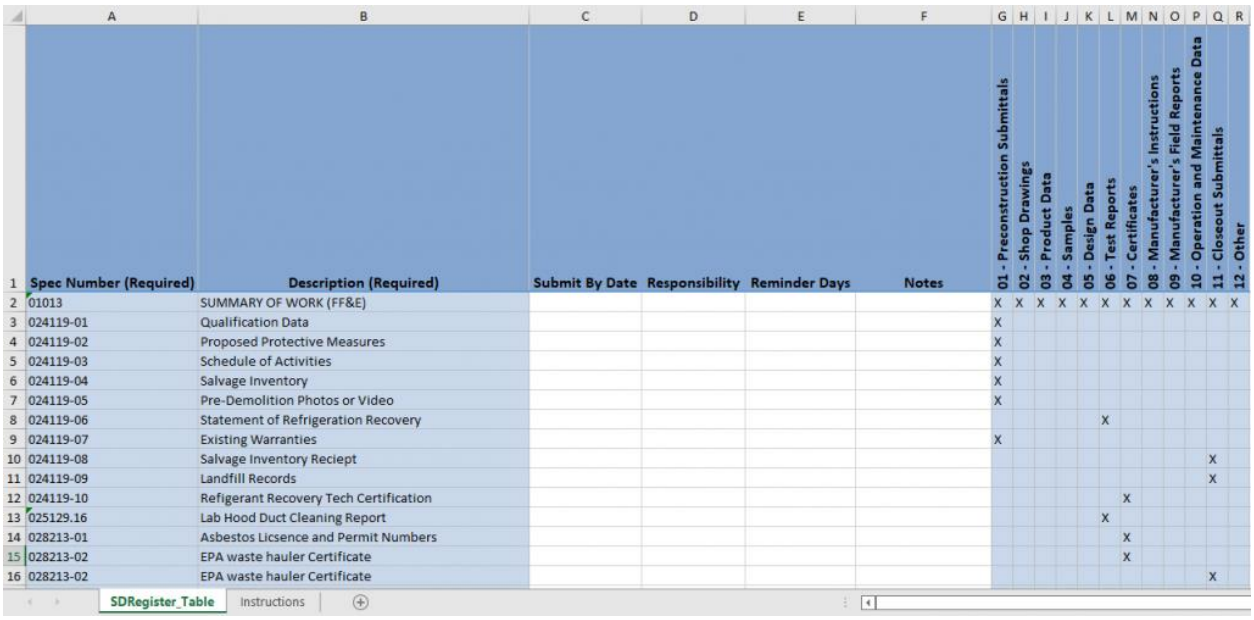
3. Individual register items can be created by clicking on the **+ Register** Fill out all mandatory fields and click Save.



4. Register items can be created in bulk by importing them through a Submittal Register template. This can be found in the **Import/Export** button on the upper right of the Submittal Register area.
5. Click the **Template** button to download the **RegisterSDImportTemplate** file onto your computer, then open the file.



6. Fill out the mandatory columns (highlighted light blue) for each register item. Each row can be used to populate a new register item, or even several register items of the same Spec Number + Description if multiple boxes are marked for the submittal type. Refer to the **Instructions** tab in the file for any specifics now how data should be entered for each column.



	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
1	Spec Number (Required)	Description (Required)	Submit By Date	Responsibility	Reminder Days	Notes	01 - Preconstruction Submittals	02 - Shop Drawings	03 - Product Data	04 - Samples	05 - Design Data	06 - Test Reports	07 - Certificates	08 - Manufacturer's Instructions	09 - Manufacturer's Field Reports	10 - Operation and Maintenance Data	11 - Closeout Submittals	12 - Other
2	01013	SUMMARY OF WORK (FF&E)					X	X	X	X	X	X	X	X	X	X	X	X
3	024119-01	Qualification Data					X											
4	024119-02	Proposed Protective Measures					X											
5	024119-03	Schedule of Activities					X											
6	024119-04	Salvage Inventory					X											
7	024119-05	Pre-Demolition Photos or Video					X											
8	024119-06	Statement of Refrigeration Recovery										X						
9	024119-07	Existing Warranties					X											
10	024119-08	Salvage Inventory Reciept															X	
11	024119-09	Landfill Records															X	
12	024119-10	Refigerant Recovery Tech Certification											X					
13	025129.16	Lab Hood Duct Cleaning Report										X						
14	028213-01	Asbestos Licsence and Permit Numbers											X					
15	028213-02	EPA waste hauler Certificate											X					
16	028213-02	EPA waste hauler Certificate															X	

SDRegister_Table | Instructions

7. Once the template has been populated, return to the window where you had downloaded it to import it. Use the **Select** button to pick the template file from your computer and click **Import**.