Submittals

How do I create a Submittal?

Submittal Creation

To create a new Submittal, start by clicking on the **Documents** tab, then click on **Submittals**. This will take you to the Submittals library. If the Submittals tab is not visible, Submittals are not enabled for this project. Contact the Project's Admin to have this document enabled.

The Submittals library will contain a list of all Submittals related to the selected project. To create a new Submittal, click on the green **Add New** button. This will bring up the New Submittal form. If the **Add New** button is not visible, the Project Admin is not allowing others to create Submittals. Contact the Project Admin (usually the GC) to have them create the Submittal and assign it to you.

The options available on the New Submittal screen are dependent upon the Document Configuration settings established by the Project's Admin. Instructions for each field are included below.

Title: Type in a descriptive title for the document. This title will be visible in the document list. Let people know what it is. Once the Submittal has been submitted, the title can only be changed by the General Contractor (GC), and only while it is in the GC's court. If your company has rules regarding the naming of items in ConDoc, please Save Your Work and review the data fields for accuracy prior to clicking **Submit**.

Type: This is a dropdown list of Submittal types pre-set by the Project's Admin. Select the Type that best matches the Submittal.

Initiator/Responsible Party: This is a dropdown list of all companies assigned to this project. Select your company from the list.

Submit To: This field may be preset by the Project Admin. If not, you will have a dropdown menu with all companies (except subcontractors) assigned to this project. Select the company that needs to approve the information you are providing.

Due By: This date is set by the Project Admin; the default time is 14 calendar days. If the priority of the Submittal requires that it be addressed quicker, you can change the due date by clicking on the calendar icon or date in the Due By field and selecting another date.

Specs: Type in the specifications or whatever other information is needed. If you need to add files as attachments, you will have the opportunity to do so in the Submittal Documents field.

Submittal Visibility Upon Completion: This field will only be visible to the GC. Use the dropdown to select Public – All Project Companies (all companies assigned to the project will be able to see the Submittal), or Private – Assigned Companies Only (only companies identified in the Document Visibility settings will be able to see the Submittal).

Document Visibility: This box only allows the selected parties to view the Submittal, not edit it. Your company will be selected by default. Other companies can be added by clicking the checkbox next to the company you want to be able to see the Submittal. Selected parties will be able to view the Submittal wherever it may be in the workflow, but they will not receive notifications. Email notifications will only be sent to the company/employees when the Submittal is assigned to it/them, or to everyone who has access when the Submittal is approved or rejected. This box will not change the workflow.

Submittal Documents: This box allows you to include files and/or other supporting documentation by selecting them in the file explorer or by dragging and dropping them into the box. You can add as many files as you need.

Activity: On the right-hand side of the New Submittal form is an Activity window. This feature allows you to view the document's history while you work on it. For new Submittals that have not been submitted, this window will show each instance that this document was opened. Each entry will show the date and time any actions were taken.

At the bottom of the New Submittal Form are three option buttons: **Submit**, **Save Your Work**, and **Close**.

- **Submit**: Once you have completed the form, use this button to submit the Submittal.
- **Save Your Work**: Use this button to save your progress as you create the Submittal. You may need to find a document, take a photo, or get input from another person. Saving your progress will prevent you from having to recreate the Submittal from the beginning. It also allows other people in your company to edit the new Submittal, so any changes you make will be visible to them as soon as you save it. This will allow them to add additional information or edit the document prior to submission. Saving your work will give you the option to add comments to the Submittal as you edit it before submission. This can be helpful if you need input from someone else. Another feature of the Save Your Work button is that it will immediately update the document for everyone who can see it. If you grant someone access to the document by checking the boxes in the “Who can see this” section, those people will be able to view the document as soon as you save it.
- **Close**: If you click on the Close button, the Submittal form will close, and no changes will be saved. If you were editing a previously saved (not submitted) New Submittal form, only the edits will be lost. The form will return to its previously saved condition.

The GC's Project Admin will have a fourth option button, **Assign to Initiator**. This option allows the GC's Project Admin to create the Submittal and assign it to the party responsible for the needed information.

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Once submitted, the Submittal will be locked for the creator and unlocked for the person the submittal is assigned to. The submittal must be unlocked to edit the title or other elements.

Unique solution ID: #1104
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Last update: 2019-08-12 22:28