

Submittals Training Guide (Mentor)

Date Created: 8/2/2021 Date Updated: 6/24/2022

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About

Submittals is a log that tracks information required to be submitted by the CM Firm for SCA's approval during the contract. Information includes but is not limited to plans, reports, logs, tests, product data, material safety data sheets, samples, drawings, diagrams, images, videos, and certificates.

Notes

While the Submittal process is consistent for all project types, the terms CM Firm and CM PM are specific to Requirements projects. The CM Firm acts on behalf of the General Contractor and the CM PM is in the role of the Project Officer.

Process Overview

The members of the CM Firm prepare a Submittal Log to the CM Firm PM and AEoR for approval. Once the log is approved, the CM Firm provides Submittals to the Submittal Coordinator for administrative review. The Submittal is assigned to the Official Reviewer who may accept the Submittal, send to a Secondary Reviewer, or place the Submittal on hold for up to 30 days. Upon completion of the review cycle, the Official Reviewer will provide a response.

Three responses close the Submittal.

- No Exceptions Taken
- Make Corrections Noted
- Reviewed: No Action Taken

Two responses require the CM Firm to resubmit by starting a new review cycle.

- Revise and Resubmit
- Rejected: Not Approved

After a submittal has been completed, the CM Firm can request a new review cycle when new documentation needs to be sent to the Official Reviewer. If the original reviewer approves this request, then the CM Firm will be able to upload new documentation and submit to the Submittal Coordinator.

Workflow Diagram



Step-by-Step Instructions

Submittal Log Create Submittal Item

Role		Preceding Stens		Outcome
Noic		Treccuring Steps		outcome
CM Firm	\rightarrow	CSI Codes are uploaded.	\rightarrow	The submittal item is created.

Steps

1. Go to 'Project Finder' > Navigate to the desired Program > Select the desired Subproject

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2. Go to 'Apps' > Select 'Submittals'

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ď	Messages		Cost Management	No Notice of Direction	Portfolio Manager	
Ģ	Getting Started		Budget Expenses Summer	RFIS Submittals TC TCR Index Management O Locations	PM Pre-Construction Meeting Items Project Directory Pr Properties Sc Submittal Closeout Master Log	
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3. Select 'New' > Select Building/LLW > Enter 'CSI Code' and 'Submittal Name' > Click 'Save/Close'

Note: For projects with multiple buildings, enter the building ID associated with the selected LLW at the beginning of the submittal name.

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4. If the submittal log has not been approved, the submittal will appear in the Submittal Log Approval view. Select 'Default' view > Change the view to 'Submittal Log Approval'



Request for Approval of Submittal Log

Role		Preceding Steps		Outcome
CM Firm	\rightarrow	Submittal added for approval.	\rightarrow	The submittal log is sent to the CM Firm PM for approval.

Steps

1. Select 'Default ' > Change the view to 'Submittal Log Approval'

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2. Select any submittal item > Select 'Submittal Log' > Select 'Request for Approval of Submittal Log'



3. Select 'Request for Approval of Submittal Log'

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Approve Submittal Log

Role		Preceding Steps		Outcome
Order: CM Firm PM > AEoR	\rightarrow	The submittal log has been submitted for approval.	\rightarrow	The submittal log is approved.

Steps

1. Navigate to Messages > Select Submittal Log approval message > Select 'Open in Kahua' link

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- 2. Switch to the Submittal Log Approval view (process shown above)
- 3. Select any submittal item > Select 'Submittal Log' > Select 'PO Approve Submittal Log' or 'AEoR Approve Submittal Log'

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4. Enter comment in PO Comment or AEoR Comment > Select 'PO Approve Submittal Log' or 'AEoR Approve Submittal Log'

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Add Comment to Submittal

Role		Preceding Steps		Outcome
CM Firm PM, AEoR	\rightarrow	The submittal log has been submitted for approval and needs to be returned.	\rightarrow	A submittal is updated with a comment.

Steps

1. Select the desired submittal > Select 'Comment'

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2. Enter comment > Select 'Continue'

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Reject Submittal Log				
Role		Preceding Steps		Outcome
CM Firm PM, AEoR	\rightarrow	The submittal log has been submitted for approval and needs to be returned.	\rightarrow	The submittal log is returned to the CM Firm.

Steps

1. Select any submittal item > Select 'Submittal Log' > Select 'PO Approve Submittal Log' or 'AEoR Approve Submittal Log'



 Enter comment in PO Comment or AEoR Comment > Select 'PO Reject Submittal Log' or 'AEoR Reject Submittal Log'



Submittals Update Approved Submittal

Role		Preceding Steps		Outcome
CM Firm	\rightarrow	The Submittal is created but has not been submitted.	\rightarrow	The Submittal has been updated.

Steps

1. Select 'Submittal Log Approval' > Change view to 'Default'

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2. Select Submittals > Select the desired Submittal > Select 'Edit'

	Submittals					Q	262 Electrical System	is 🧷		External REQMT-C SOA OM Firm 1	M1 .	-		
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3. Select 'Category', 'Type', and one of the three checkboxes

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4. Select the pop-out icon in the 'REVIEW CYCLE' section> Select the '...' icon to upload a File > Select the file to upload > Click 'Open' > Click 'Ok' > Click 'Done'

Note: The name of the uploaded file should start with the building ID (for example, Q262).

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	Category Sample	ITEM DETAILS
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5. Select 'Save / Close'

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Q Search		Submittal Title Metal Deck Sample	REVIEW CYCLE
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Submit Submittal

Role	Preceding Steps	Outcome
CM Firm -	The Submittal is created but has not been submitted.	 Sends the Submittal to the Submittal Coordinator. If the CSI Code begins with 01 or 02, the Submittal Coordinator is the CM Firm PM. If CSI Code begins with 03 to 16, the Submittal Coordinator is Submittal Coordinator selected in the Portfolio Manager Roster If CSI Code begins with 03 to 16 and the AEoR and Submittal Coordinator are the same person, the submittal is assigned to the AEoR

Step

Select 'Submittals' > Select the desired Submittal > Click 'Submit'



Submittal Coordinator – Assign Official Reviewer

Role		Preceding Steps		Outcome
Submittal Coordinator	\rightarrow	The Submittal is submitted	\longrightarrow	The Official Reviewer is
Submittal Cool amator		The Submittants Submitted.		assigned.

Step

1. Navigate to 'Tasks' > Select the task > Scroll down to the 'REVIEWERS' section > Select the Official Reviewer > Click 'Send to Official Reviewer'

Ê	Tasks	SCA DEVQA	SCA Plans Desk — 🗖 🗙
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		Hold Date Hold Reason V ITEM NETABLE Save	5 Send To Official Reviewer Return
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Submittal Coordinator – Return Submittal

Role		Preceding Steps		Outcome
Submittal Coordinator	\rightarrow	A Submittal is received; however additional or corrected information is needed.	\rightarrow	The Submittal is returned to the CM Firm.

Step

1. Navigate to 'Tasks' > Select the task > Navigate to the 'COMMENTS' section > Enter comments > Click 'Return'

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				New comment Please provide additional documentation	
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Official Reviewer – Download/View Submittal File

Role		Preceding Steps		Outcome
				The Submittal file is
Official Reviewer	\rightarrow		\rightarrow	downloaded to markup or
		me.		send to a Secondary Reviewer.

Step

Navigate to 'Tasks' > Select the task > Scroll down to the 'REVIEW CYCLE' section > Select the pop-out icon > Select 'DOWNLOAD' > Click 'Save'

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Official Reviewer – Send to Secondary Reviewer

Role		Preceding Steps		Outcome
Official Reviewer	\rightarrow	The Submittal is assigned but a response has not been provided.	\rightarrow	The Submittal is sent to a Secondary Reviewer for response.

Step

Select 'Tasks' > Select the task > Scroll down to the 'SECONDARY REVIEWERS' section > Select 'Insert' > Select 'Secondary Reviewers'

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Secondary Reviewer – Response

Role		Preceding Steps	_	Outcome
Secondary Reviewer	\rightarrow	The Submittal is assigned but a response has not been provided.	\rightarrow	Response provided to the Official Reviewer.

Steps

1. Select 'Tasks' > Select the task > Scroll down to the 'MY RESPONSE' section > Select 'UPLOAD' > Select the file to upload > Click 'Open' > Click 'OK'

Note: The name of the uploaded file should start with the building ID (for example, Q262).



2. Enter the 'Secondary Response' > Click 'Respond'



Official Reviewer – Add Secondary Response to Official Response

Role		Preceding Steps		Outcome
Official Reviewer	\rightarrow	Submittal received.	\rightarrow	Response is completed if the Official Reviewer approves.

Steps

1. Select 'Tasks' > Select the task > Scroll down to the 'SECONDARY REVIEWERS' section > Select the pop-out icon > Scroll to the right > Click the 'Add to Response' checkbox > Click 'Done'

Note. As needed, download the Secondary Responder's file to provide additional markup or upload as the official response file. See the 'DOWNLOAD' link on the second image.



2. Click 'Add Responses to Official Response Notes'

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Official Reviewer – Response that Completes Workflow

Role		Preceding Steps		Outcome
Official Reviewer	\rightarrow	The Submittal is assigned.	\rightarrow	Response is completed if the Official Reviewer approves.

Steps

1. Navigate to 'Tasks' > Select the task > Navigate to the 'REVIEWERS' section > Select the response of 'No Exceptions Taken', 'Make Corrections Noted', or 'Reviewed: No Action Taken' > Enter the response notes

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2. Scroll down to the 'REFERENCES' section > Select 'UPLOAD' > Select the file to upload > Click 'Open'



3. Click 'Submit Response'

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Official Reviewer – Response that Requires New Cycle

Role	_	Preceding Steps	_	Outcome
AFoR	\rightarrow	Submittal received	\rightarrow	Response is completed if the
ALON		Sublinitial received.		Official Reviewer approves.

Steps

1. Navigate to 'Tasks' > Select the task > Navigate to the 'REVIEWERS' section > Select the response of 'Revise Resubmit' or 'Rejected: Not Approved' > Enter the response notes

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2. Navigate to the 'REVIEW CYCLE' section > Scroll right > Select the '...' icon > Select the file to upload > Select 'Open' > Select 'Ok'



3. Click 'Submit Response'



Resubmit Submittal

Role		Preceding Steps		Outcome
		A Submittal cycle ends with a	_	
CM Firm	\rightarrow	Response of Revise and Resubmit	\rightarrow	The Submittal is resubmitted.

Steps

1. Select 'Submittals' > Select the Submittal > Click 'New Review Cycle' > Select 'EDIT'

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 Scroll down to the new review cycle > Scroll Right to see the '...' icon > Select the '...' icon > Select 'SELECT FILE' > select the file to upload > Select 'Open' > Select 'Ok'

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4. Click 'Submit'



Official Reviewer - Place Submittal Review on Hold

Role		Preceding Steps		Outcome
Official Reviewer	\rightarrow	The Submittal is assigned.	\rightarrow	The review is placed on hold for up to 30 days.

Step

Navigate to 'Tasks' > Select the task > Scroll down to the 'HOLD' section > Enter the hold information > Click 'Place on Hold'

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Role		Preceding Steps		Outcome
Official Reviewer	\rightarrow	Submittal review was placed on hold.	\rightarrow	Submittal review brought back to the Official Reviewer.

Step



View Completed Submittal File

Role		Preceding Steps		Outcome
CM Firm, CM PM, AEoR	\rightarrow	Submittal is complete.	\rightarrow	View the documentation for the completed submittal.

Step

Click on a completed submittal > Scroll down to References section > Click on the file to view > Click 'View'

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Request New Review Cycle

Role	Preceding Steps	Outcome
CM Firm	The submittal has been completed.	The submittal is sent to the original reviewer to approve the new cycle.

Step

In the Submittals application, select the desired submittal > Click 'Request New Review Cycle'



Approve New Review Cycle

Role		Preceding Steps		Outcome
Original Reviewer	\rightarrow	The CM Firm has requested a	\rightarrow	The new review cycle request is approved, and the CM Firm
		new review cycle.		can add an additional cycle.

Step

1. Go to Tasks > Select the Request New Review Cycle task > Select 'Approve'



2. Click 'OK' to confirm



Reject New Review Cycle



Steps

1. Go to Tasks > Select the Request New Review Cycle task > Select 'Reject'

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2. Enter a comment > Select 'Continue'

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Add Additional Review Cycle

Role		Preceding Steps		Outcome
CM Firm	\rightarrow	The request for a new review cycle has been approved by the original reviewer.	\rightarrow	The CM Firm can update and resubmit the submittal.

Step

In the Submittals application, select the submittal > Select 'Add Additional Cycle'



Replace PDF of Completed Submittal

Role		Preceding Steps		Outcome
Official Reviewer	\rightarrow	Submittal is complete.	\rightarrow	The documentation in the References section is updated.

Step

1. In the Submittals application, select the desired record > Select 'Replace PDF'

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2. Click 'OK' to confirm



3. Go to Tasks > Select the Official Reviewer Replace PDF task > Update documentation in the References section

Note: To remove a file, click on the file description and then select 'Remove' at the top of the table. Add a file by selecting 'Upload'.

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4. Select 'Replace PDF'

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Recall Submittal

Role		Preceding Steps		Outcome
		The submittal has been submitted by the CM Firm.	_	
Official Reviewer, Submittal Coordinator, Admin, Moderator	\rightarrow	OR	\rightarrow	The review cycle returns to the previous step.
		The CM Firm has requested and added an additional cycle.		

Step

In the Submittals application, select the desired submittal > Select 'Recall' > Click 'OK' to confirm

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