

Submittals Training Guide (Mentor)

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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

ĥ	Project Finder	C000015851-MC0001 - Q262 Electrical Systems 🧳	External REQMT-CM1 SCA CM Firm 1	-	□ ×
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2. Go to 'Apps' > Select 'Submittals'

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		←	Q Search	Visit the kStore to explore more than 50 project	management apps that work the way you want them to work. Visit the kStore 🔀	
ී .: ද (	Project Finder Apps Search Tasks	•	Recent Submittals Getting Started Contacts Administration LG Dev Logs Installed Apps	Document Management Bu Bulletin Gi Change in Conditions Daily Reports IF IFA Meetings NC NCR	other Community Contacts File Manager Getting Started LLW Media Manager	
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.

Submittals	C000015851-MC0001 - Q262 Elec	trical Systems 🖋 External REQMIT-CM1 – 🗆 🗙
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Apps		Expense Contract MC0001 - SCA GC 1
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🖆 Taska		Building ID COMMENTS Design Number
		LLW
Messages		Architect SCA In House AEoR - SCA Sandbox
C * Submittals		Contractor SCA Grp Test EXT-GC-1 - SCA GC 1
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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'

![](_page_5_Picture_4.jpeg)

## **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'

![](_page_6_Picture_6.jpeg)

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

	Messages		C000015851-MC0001 - Q262 Ele	ctrical Syste	ms 🧨	External REQMT SCA CM Firm 1	-см1-рм	- 0	×
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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'

	Submittals					C000080	)190 - X468	C80190 New Bldg W C	ellar	1	SCA PO	dbox	-	□ ×
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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'

![](_page_10_Picture_3.jpeg)

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

![](_page_10_Picture_5.jpeg)

## 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'

Submittals	C000015851-MC0001 - Q262 Electrical Systems 🧳	External REQMT-CM1 SCA CM Firm 1	- 0	×
	NEW SUBMITTAL LOG V			
Project Finder Apps Q Search	Q     Submittal Log Approval       Vews     Submittal Name       Comments       Default       >     Submittal Log Approv.2			•
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2. Select Submittals > Select the desired Submittal > Select 'Edit'

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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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Project Finder	Q Default V O	Edit 🛿 🕻 🗙 🗙
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Q Search	Section Title METAL DECK Submittal Title Metal Deck Sample	DETAILS REVIEW CYCLE
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![](_page_13_Picture_0.jpeg)

## 5. Select 'Save / Close'

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Q Search		Submittal Title Metal Deck Sample	REVIEW CYCLE
Tasks		Category Sample Type Samples	ITEM DETAILS
_0		Or Equal Substitution / Non-basis of Design	COMMENTS
Messages		Alternate Substitution	
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## **Submit Submittal**

Role	Preceding Steps	Outcome
CM Firm -	The Submittal is created but has not been submitted.	<ul> <li>Sends the Submittal to the Submittal Coordinator.</li> <li>If the CSI Code begins with 01 or 02, the Submittal Coordinator is the CM Firm PM.</li> <li>If CSI Code begins with 03 to 16, the Submittal Coordinator is Submittal Coordinator selected in the Portfolio Manager Roster</li> <li>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</li> </ul>

#### Step

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

![](_page_15_Picture_0.jpeg)

#### 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 — 🗖 🗙
	$\leftarrow$	E Lief SHARE BLEGATE HISTO	DRY B
	Tasks Project Finder Apps Search Messages Getting Started	SCA DEVQA	AEGR-SGA Sandbox
		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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			FROM SUBJECT		> SECTIONS
	Apps		External REQMT-CM1 Submittal Number: 05300-001 Submittal Coordinator	Task on Q262 Electrical Systems	DETAILS
Q	Search		1 item(s)	Official Reviewer	REVIEW CYCLE
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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).

![](_page_19_Picture_0.jpeg)

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

![](_page_19_Picture_2.jpeg)

## 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.

![](_page_20_Picture_5.jpeg)

#### 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'

![](_page_22_Picture_1.jpeg)

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'

![](_page_24_Picture_1.jpeg)

3. Click 'Submit Response'

![](_page_25_Picture_0.jpeg)

### **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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![](_page_27_Picture_1.jpeg)

3. Click 'Save / Close'

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4. Click 'Submit'

![](_page_28_Picture_0.jpeg)

**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

![](_page_29_Picture_3.jpeg)

## **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'

Submittals	C000015851-MC1003 - Net Zero Test Subproject 🧪 Stremal REQMT-CM1	- 🗆 ×
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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'

![](_page_30_Picture_5.jpeg)

#### **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'

![](_page_31_Picture_4.jpeg)

2. Click 'OK' to confirm

![](_page_31_Picture_6.jpeg)

# **Reject New Review Cycle**

![](_page_32_Figure_1.jpeg)

#### 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'

![](_page_33_Picture_4.jpeg)

## **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

![](_page_34_Picture_6.jpeg)

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

🗈 Submittals C000015851-MC0001 - Q262 Electrical Systems 🖉 💽 SCA Plans Desk – 🗆											<sup>rsk</sup> – 🗆 X
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