



Hard Bid Submittals User Guide

Date Created: 8/2/2021
Date Updated: 1/11/2023

Contents

About.....	iii
Process Overview.....	iii
Submittals Workflow Diagram.....	iv
Step-by-Step Instructions.....	1
GC Creates a Submittal Log	1
Import Excel File Submittal Log.....	2
GC Submits the Log to the PO.....	5
PO Approves the Submittal Log.....	6
AE Approves the Submittal Log	8
GC Initiates the Submittals Review Cycle.....	8
Review Cycle Submittal Coordinator.....	11
Review Cycle - Official Reviewer.....	12
Optional:.....	13
Official Reviewer sends to a Secondary Reviewer (Optional).....	13
Secondary Reviewer Responds to Review Cycle.....	14
Official Reviewer adds Secondary Reviewer Response (Optional)	14
Official Reviewer Responds to Review Cycle.....	16
GC Starts a New Review Cycle	18
PO or AEoR Approves New Review Cycle.....	19
Review Cycle on Hold.....	20
Review Cycle Hold Removed	20
New Review Cycle Request	21
New Review Cycle Reject	21
Replacing PDF of Completed Submittal	22
Recall Submittal	24

About

Submittals is a log that tracks information required to be submitted by the GC for SCAs 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.

Process Overview

The GC prepares a Submittal Log, submits to the PO and AEOB for approval. Once the log is approved, the GC initiates the review cycle for each submittal, which includes supporting documentation, and submits 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.

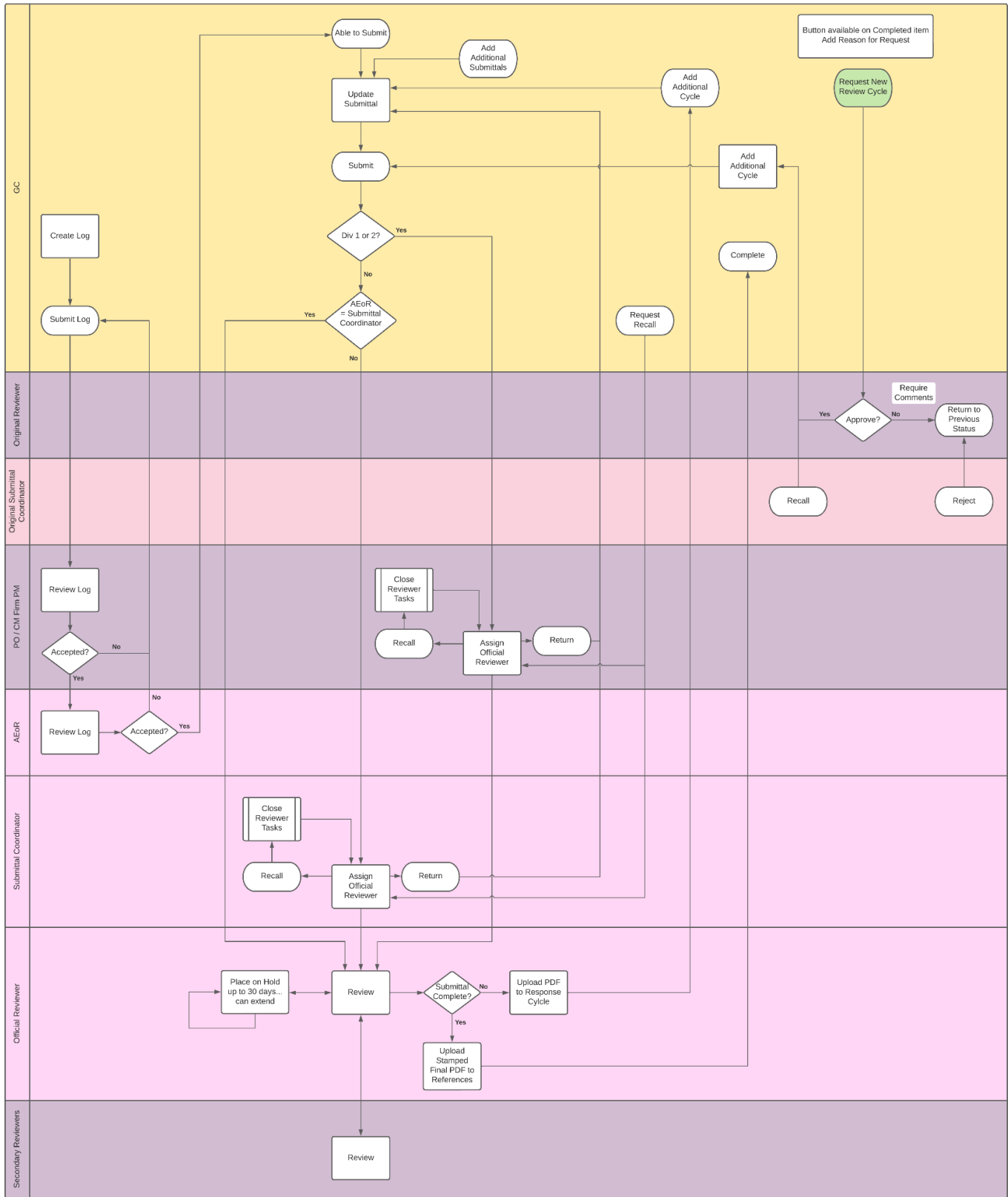
- No Exceptions Taken
- Make Corrections Noted
- Reviewed: No Action Taken

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

- Revise and Resubmit
- Rejected: Not Approved

After a submittal has been completed, the GC 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 GC will be able to upload new documentation and submit to the Submittal Coordinator.

Submittals Workflow Diagram

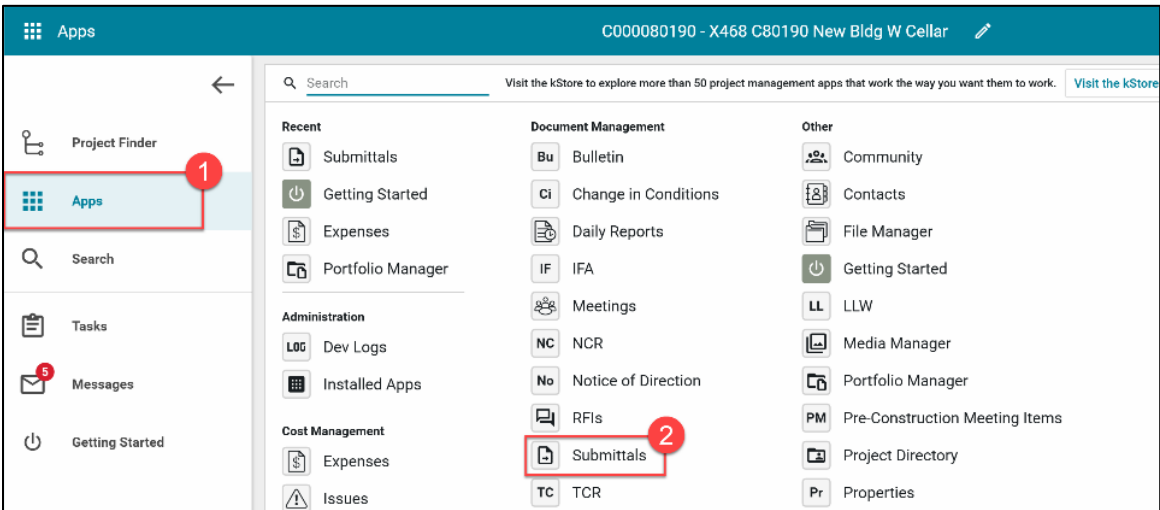


Step-by-Step Instructions

GC Creates a Submittal Log

IMPORTANT: Make sure you are in the correct project.

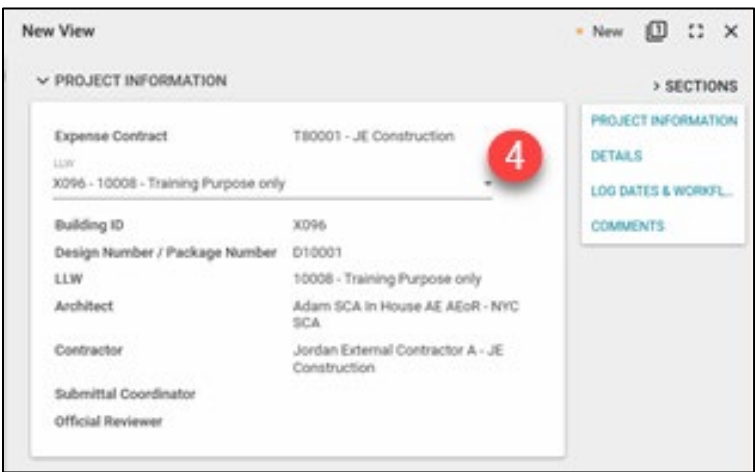
1. Click **Apps**.
2. Click **Submittals**.



3. Click **New**

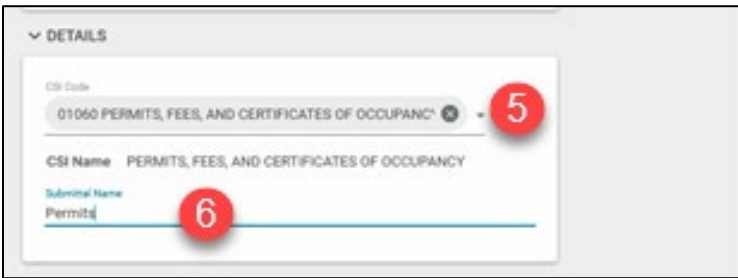


4. Select the **LLW**. If the project has multiple LLWs, choose the appropriate one from the dropdown menu. You might have to create the same submittal log for each LLW.

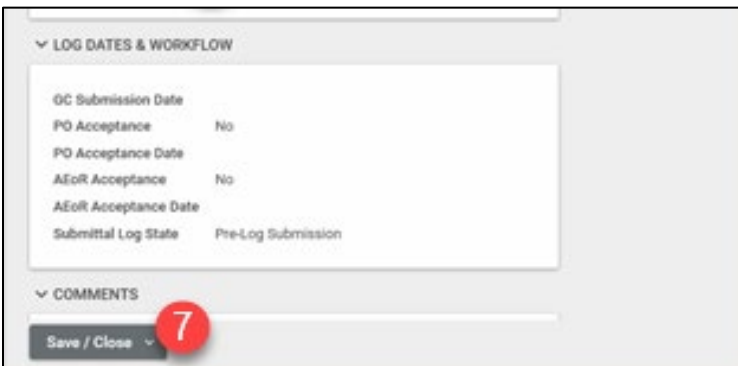


5. Select the **CSI Code** from the dropdown menu.
6. Enter the **Submittal Name**.
Note: For projects with multiple buildings, enter the Building ID associated with the selected LLW at the

beginning of the submittal name.



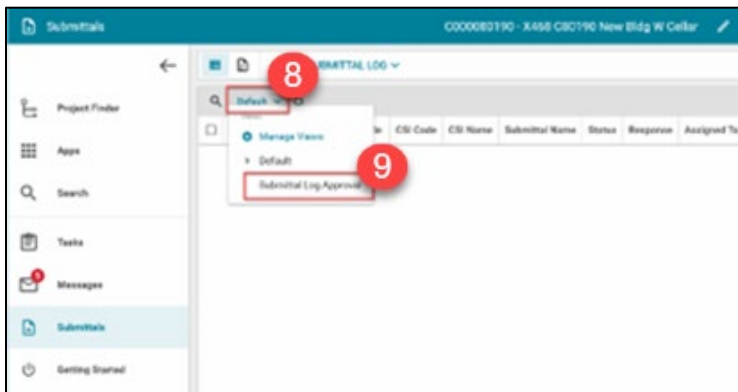
7. Click **Save/Close** or select **Save/New** from the dropdown menu to start the second line item.



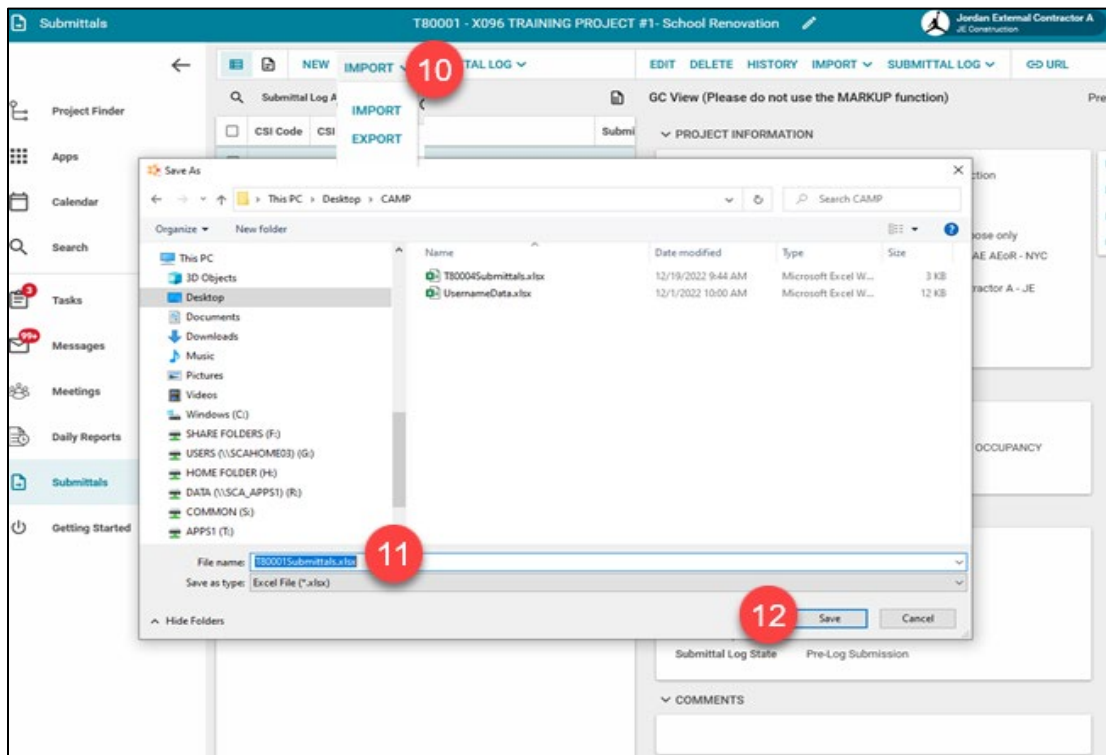
Import Excel File Submittal Log

You can create and upload a Submittals Excel file to save time.

8. Click the **Default** dropdown menu to change the log view.
9. Select **Submittal Log Approval**.
NOTE: You must be in this view to submit.



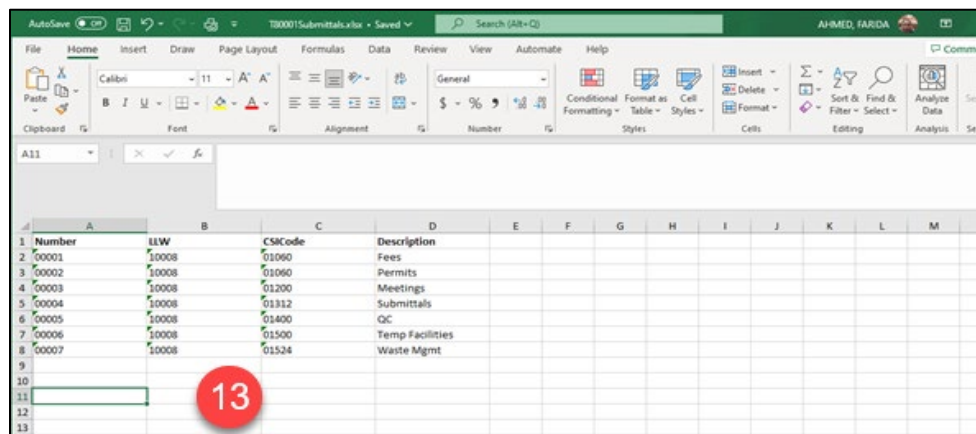
10. Click the **Import** dropdown menu and select **Export**.
11. **Name** the file.
12. **Save** the file.



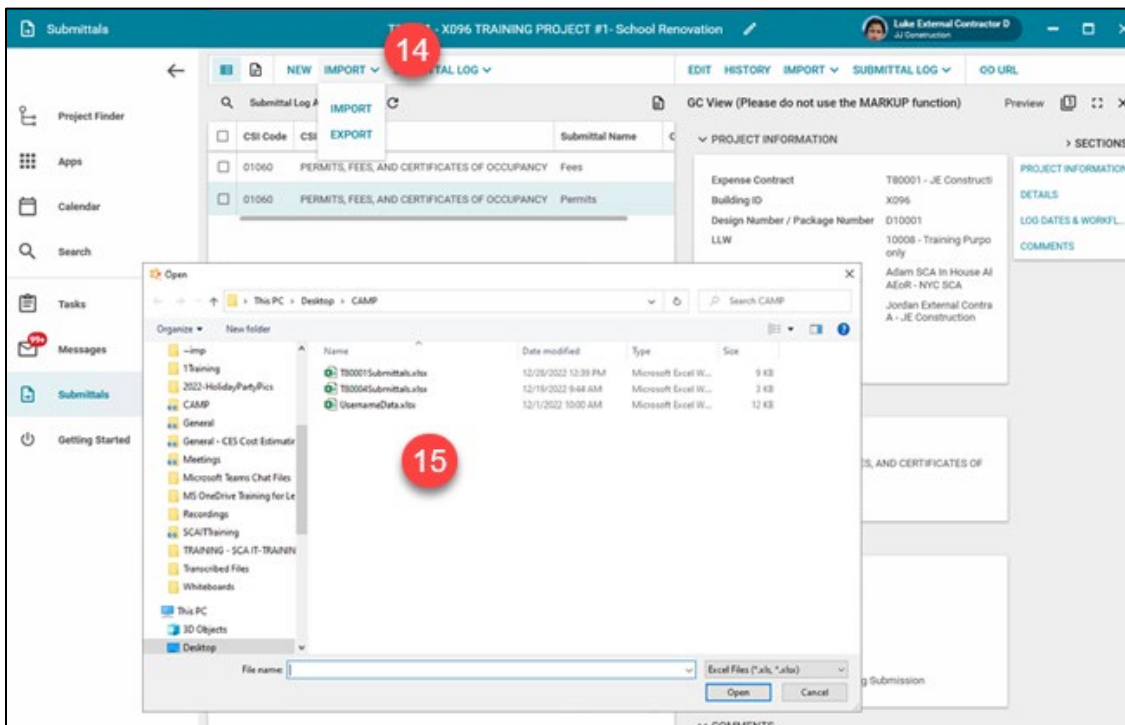
13. Open and update the Excel file. You can only import **150 items at a time**. If you are going to upload multiple files, make sure that the Item Number in Column A starts with the next number in the series. **For example:** Your first file has items 00001 – 00150. The second file should start with 00151 and go to 00300.

IMPORTANT:

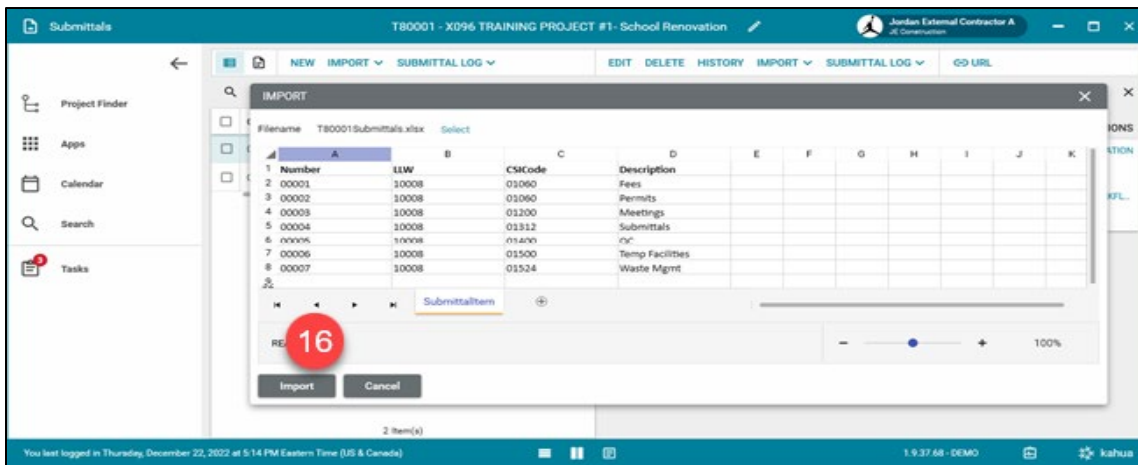
- **DO NOT** change the cell formatting
- **DO NOT** add additional columns
- **DO NOT** re-arrange columns
- **DO NOT** re-name the excel sheet



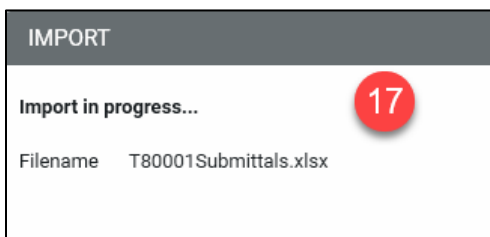
14. To import the data from the Excel file, Click the **Import** dropdown menu and select **Import**.
 15. Browse to the location of the file, select the file, and click **Open**.



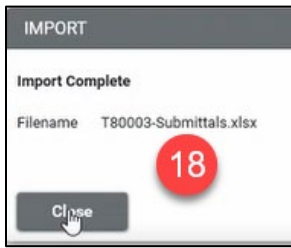
16. Once CAMP verifies the data, click **Import**.



17. CAMP will import the data. Do Not close the window



18. CAMP will confirm Import has been completed. Click **close**.



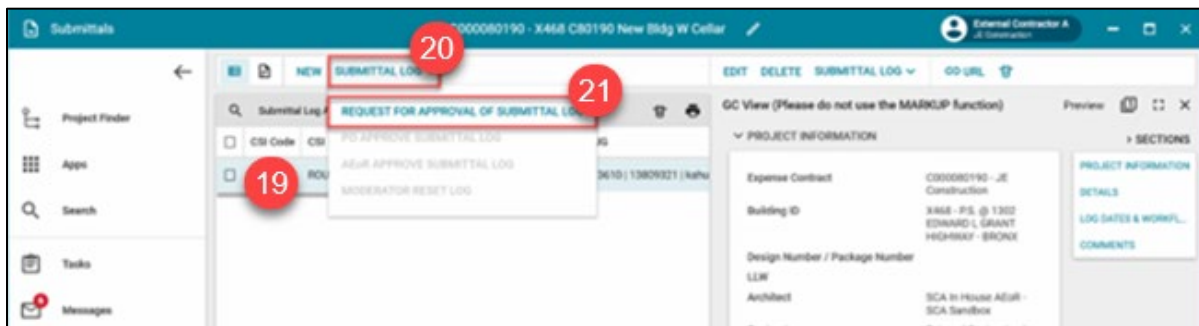
NOTE: If there is an error in the data in the excel file CAMP will let you know. Fix the error and import again.

GC Submits the Log to the PO

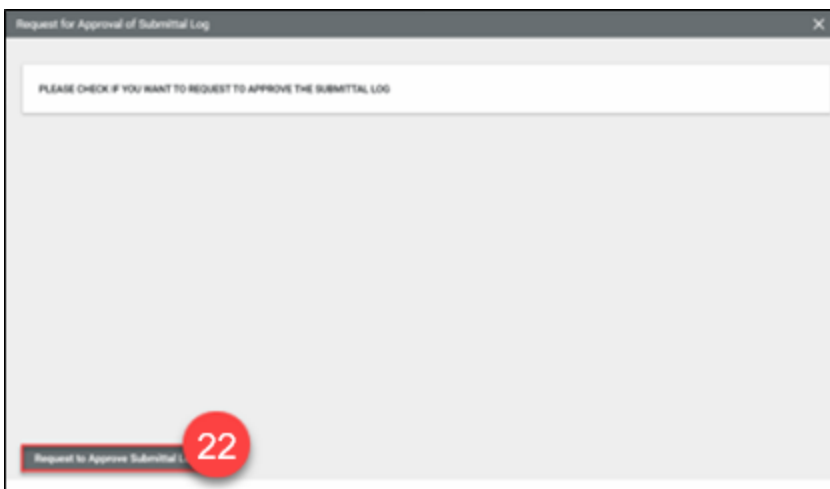
You can edit a log line item before submitting by clicking the **Edit** button, make any changes, then click **Save/Close**.

When you're ready to submit the Submittal Log to the PO:

19. Select *any* submittal item.
20. Click the **Submittal Log** dropdown menu.
21. Select **Request for Approval of Submittal Log**.



22. In the pop-up, click **Request for Approval of Submittal Log**.

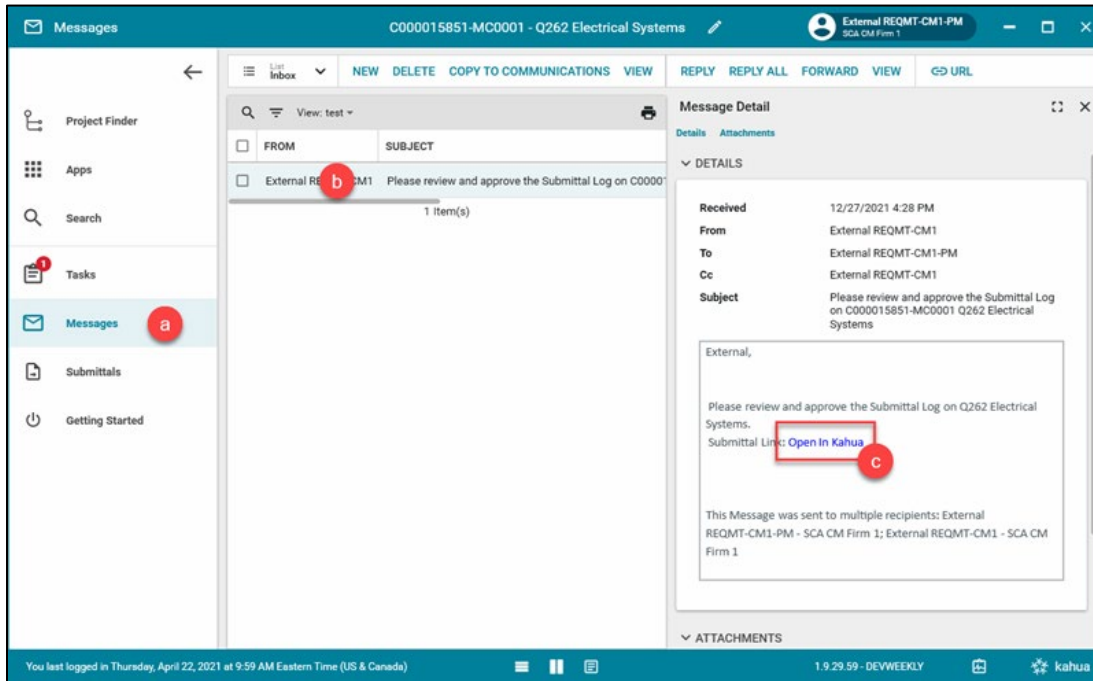


IMPORTANT: DO NOT DELETE. If you need to change any information *after* submission, please reach out to Helpdesk@nycsca.org

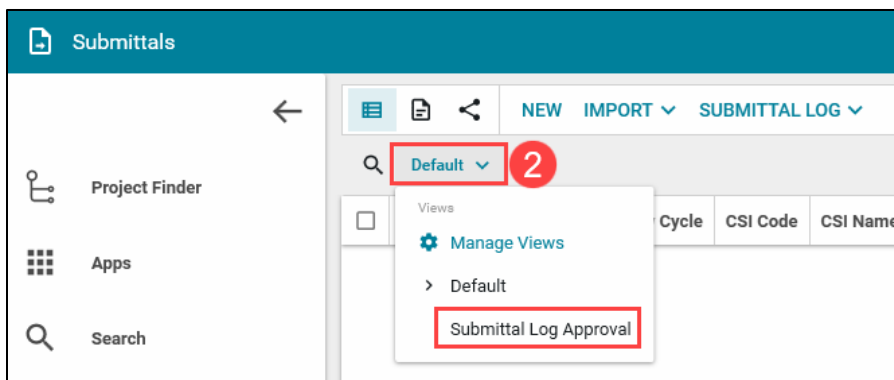
PO Approves the Submittal Log

- The PO will receive a message to review and approve the Submittal Log.
- Once the PO approves, the AE will receive a message informing them of the submittal log approval request.

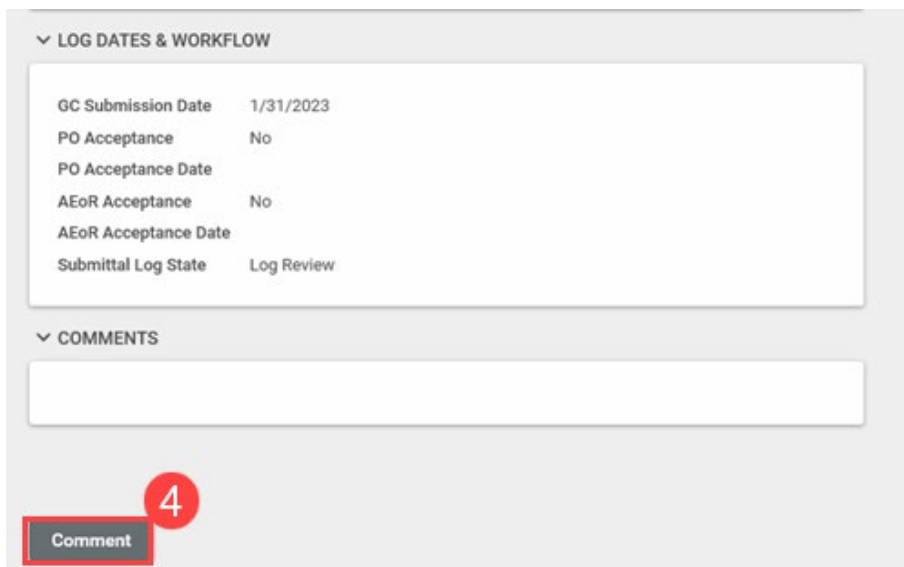
1. To access the submittal log, open the **Submittals** app, or:
 - a. Navigate to **Messages**.
 - b. Select the **Submittal Log approval message**.
 - c. Click the **Open in Kahua** link.



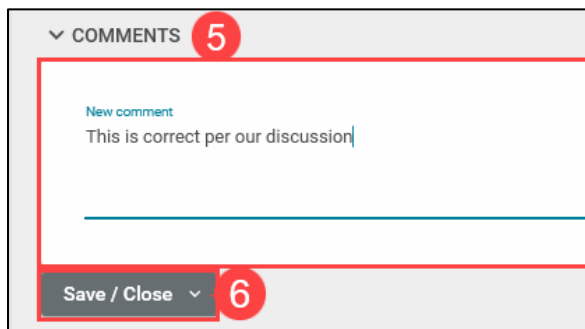
2. Click the **Default** dropdown menu and select the **Submittal Log Approval view**.



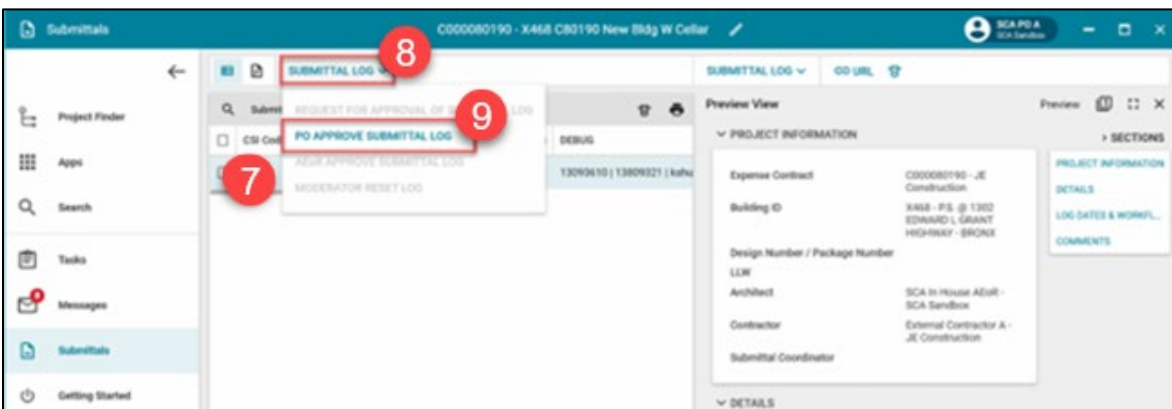
3. Review the log by selecting a submittal line item.
4. If you wish to add a comment to the line item, click **Comment** at the bottom of the record.



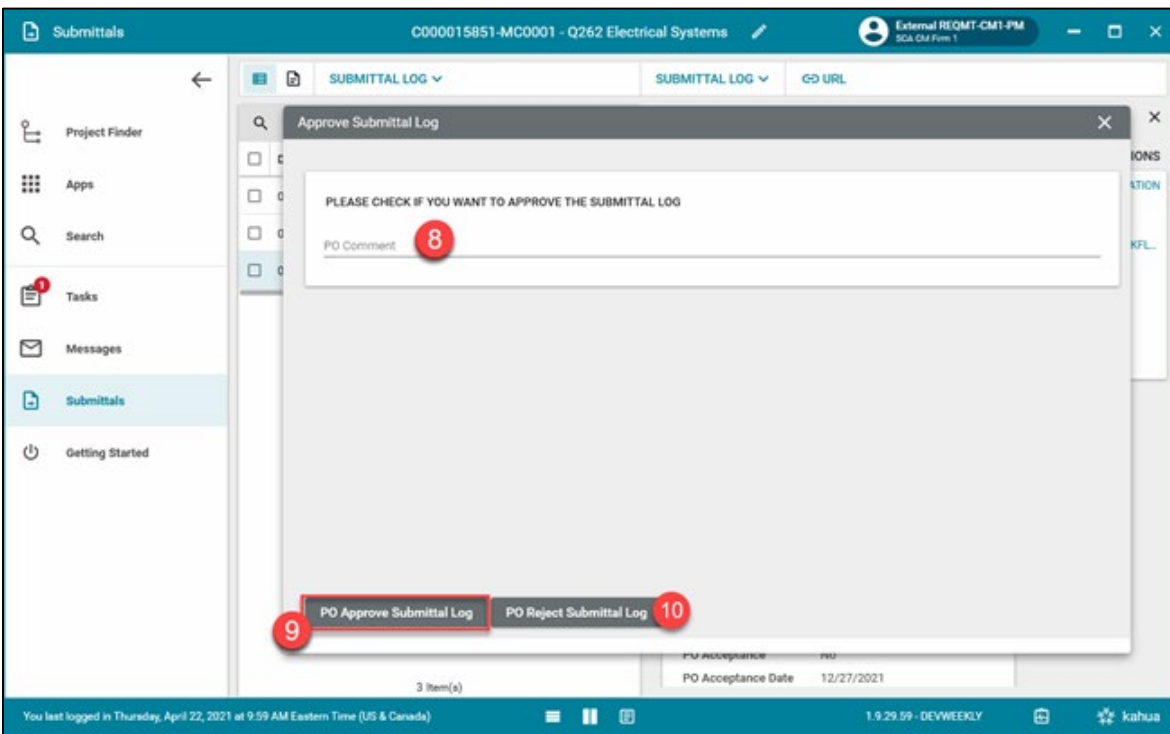
5. Enter your **comments** for that individual item.
6. Click **Save/Close**.



7. To approve the entire Submittals Log, click on **one of the Submittal items**.
8. Click the **Submittal Log** dropdown menu.
9. Click **PO Approve Submittal Log**.



10. In the popup window, enter your **PO Comments**.
11. Click **PO Approve Submittal Log**.
 - a. If the Submittal Log needs to be rejected/returned for further updates/edits, click the **PO Rejects Submittal Log**. Comments/Reason for the return is required.



AE Approves the Submittal Log

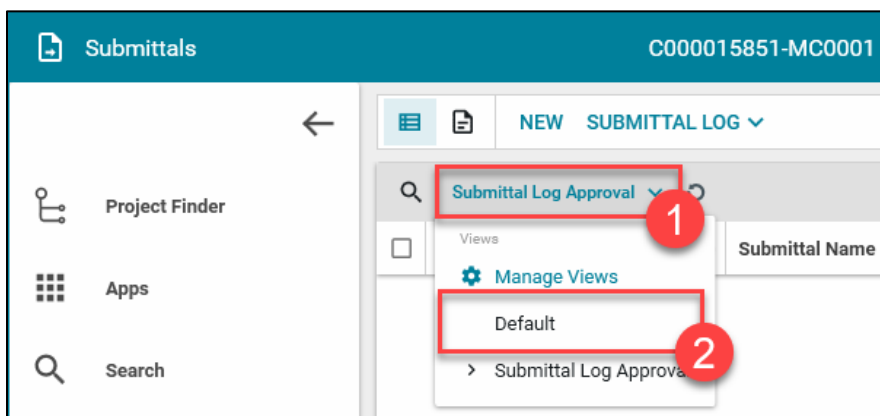
The Submittal Log has been approved by the PO and is now assigned to the AE to approve. Follow the steps for [PO Approves the Submittal Log](#).

NOTE: Step #9: click **AEoR Approve Submittal Log**

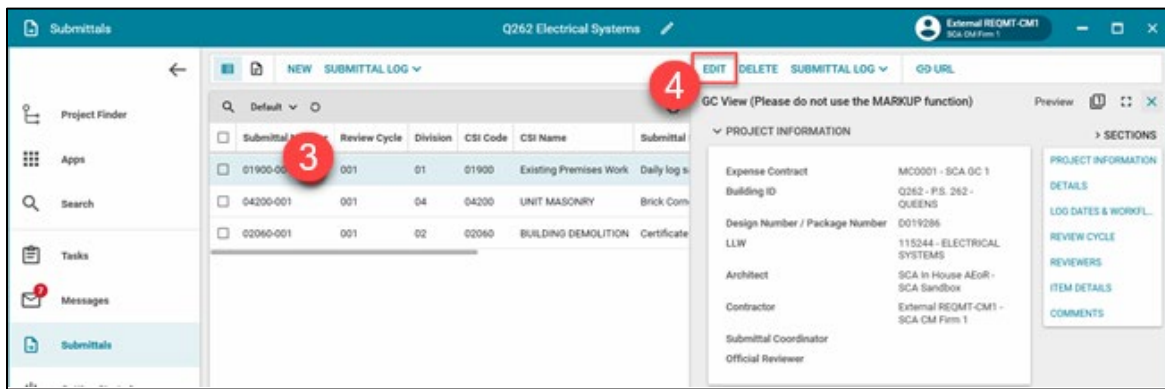
GC Initiates the Submittals Review Cycle

NOTE: The GC can add additional line items to the Submittal log, which will start a separate Log review cycle on them.

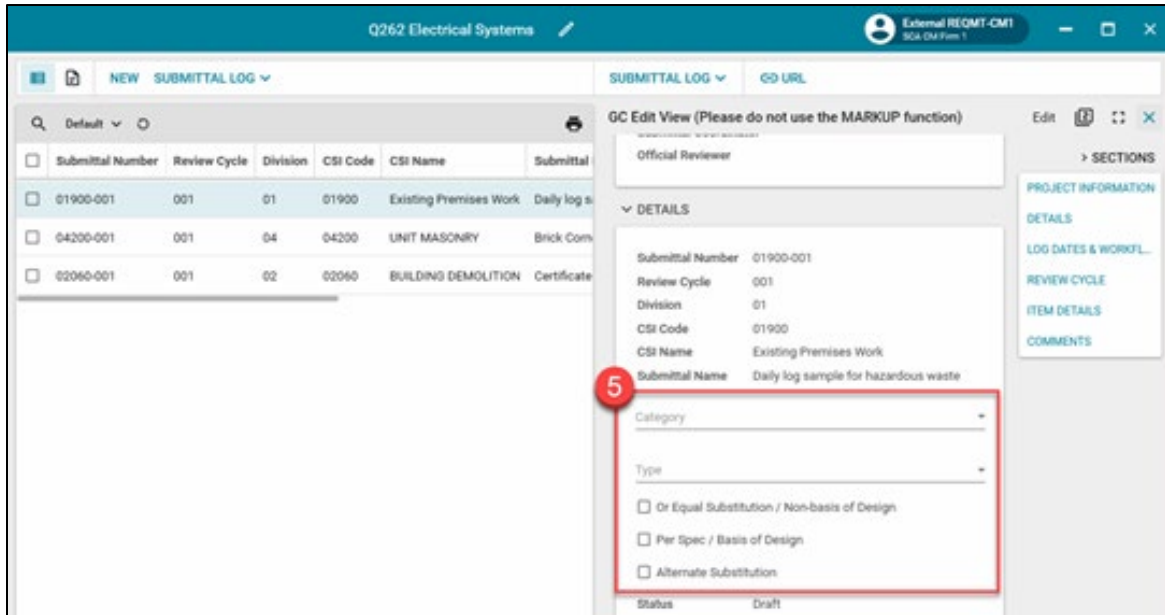
1. Navigate to the desired submittal and click the **Submittal Log Approval** dropdown menu.
2. Select **Default**. The approved log now resides in the Default list view.



3. Select the Submittal line item to start its Review Cycle.
4. Click **Edit**.



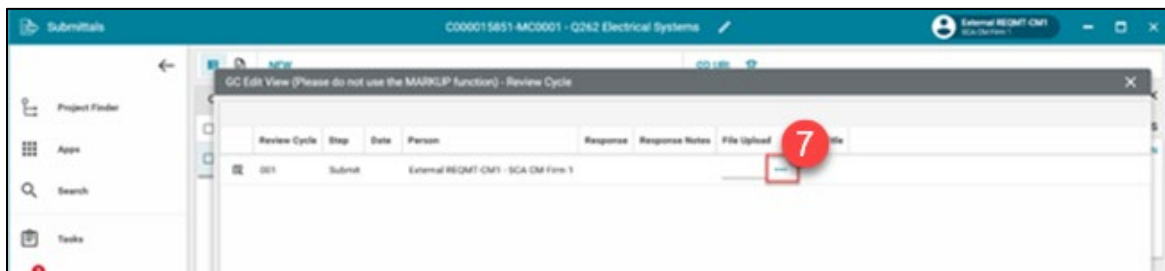
5. **Details** section: Select the **Category** and **Type** from the dropdown menus and click **one** of the three checkboxes.



6. **Review Cycle** section: Click the pop-out icon.

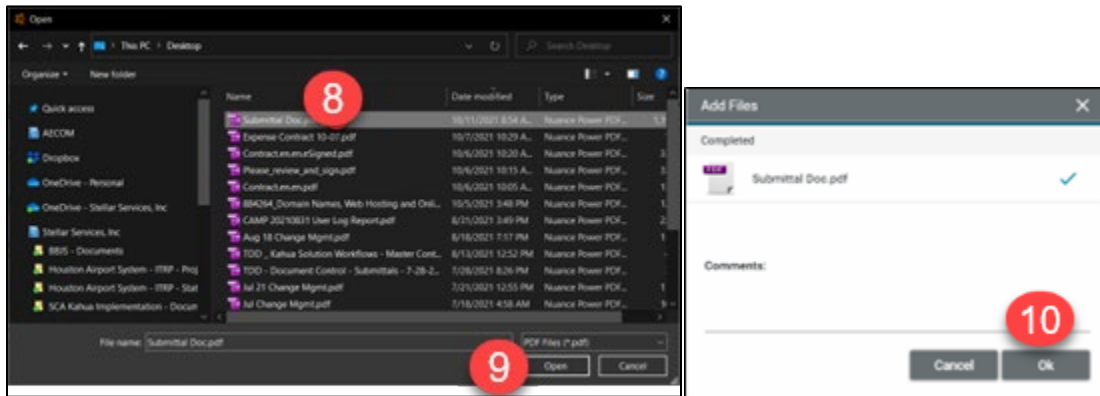


7. **Required**: Click the **three dots** “...” icon to upload the supporting documents.

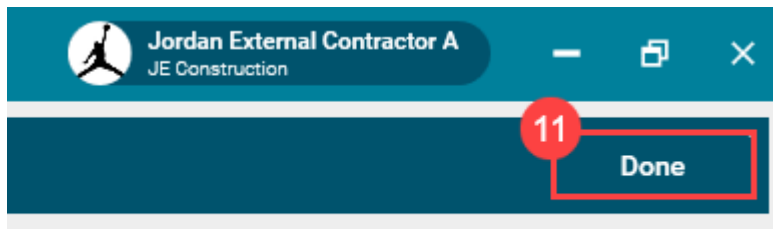


8. Select the file to upload
9. Click **Open**
10. Click **Ok**

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



11. Click **Done** in the upper-right corner



12. Click **Save / Close**

NOTE: You can click **EDIT** and make changes to the item *before* you click Submit.

13. Click **Submit**

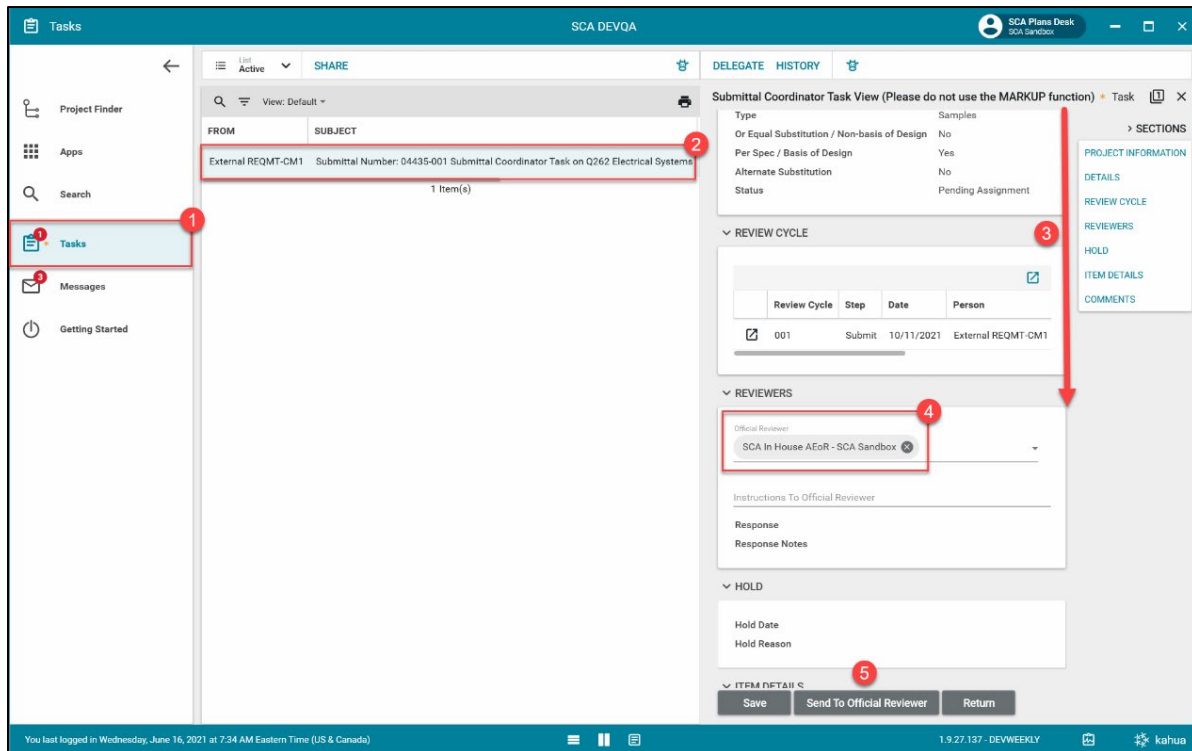
The Submittal will now go to the Submittal Coordinator for approval.

- If the CSI Code begins with 01 or 02, the Submittal Coordinator is the PO
- If CSI Code begins with 03 to 16, the Submittal Coordinator is Submittal Coordinator selected in the Portfolio Manager Roster.

Review Cycle Submittal Coordinator

The Submittal Coordinator will receive a message informing them about the review cycle. The coordinator must select an Official Reviewer for each submittal item in the review cycle.

1. Click **Tasks**.
2. Select the task.
3. Scroll down to the **Reviewers** section.
4. Select the **Official Reviewer** from the dropdown menu.
NOTE: The Official Reviewer must have access to CAMP and to the project.
5. Click **Send to Official Reviewer**.

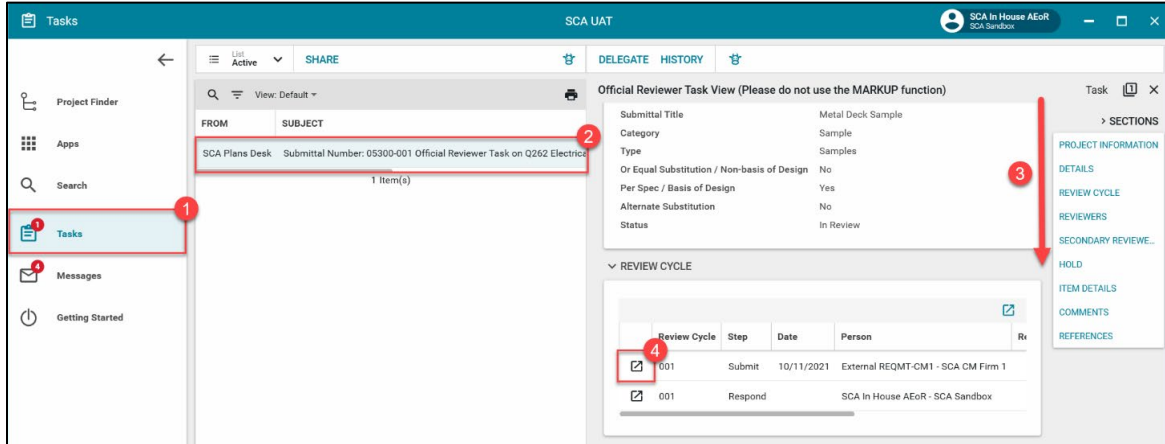


6. If needed, the Review cycle can be returned for further clarification by clicking **Return**.

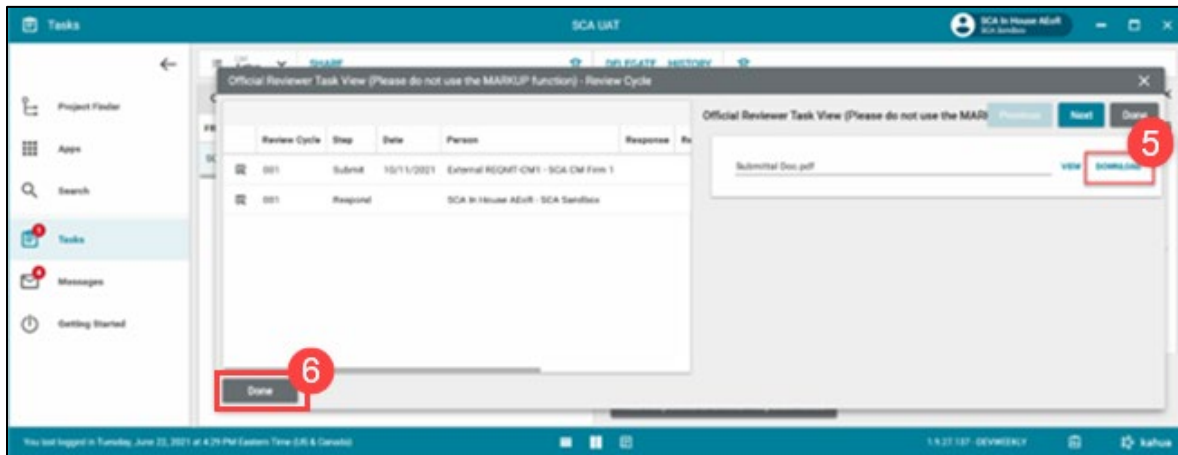
Review Cycle - Official Reviewer

The Submittal Official Reviewer will receive a message informing them of the review cycle.

1. Click **Tasks**.
2. Select the task.
3. Scroll down to the **Review Cycle** section.
4. Click the **pop-out icon** next to a Submittal line item you wish to review.



5. Click **View** or **Download** to view the attachment.
6. Click **Done**.



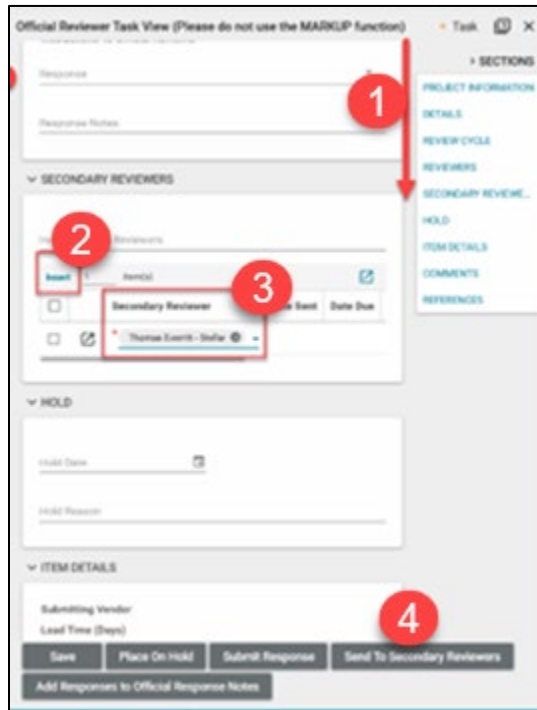
Optional:

Official Reviewer sends to a Secondary Reviewer (Optional)

You can add a Secondary Reviewer to the review cycle:

1. Scroll down to the **Secondary Reviewers** section.
2. Click **Insert**.
3. Select a **Secondary Reviewer** from the dropdown menu.
4. Click **Send to Secondary Reviewers**.

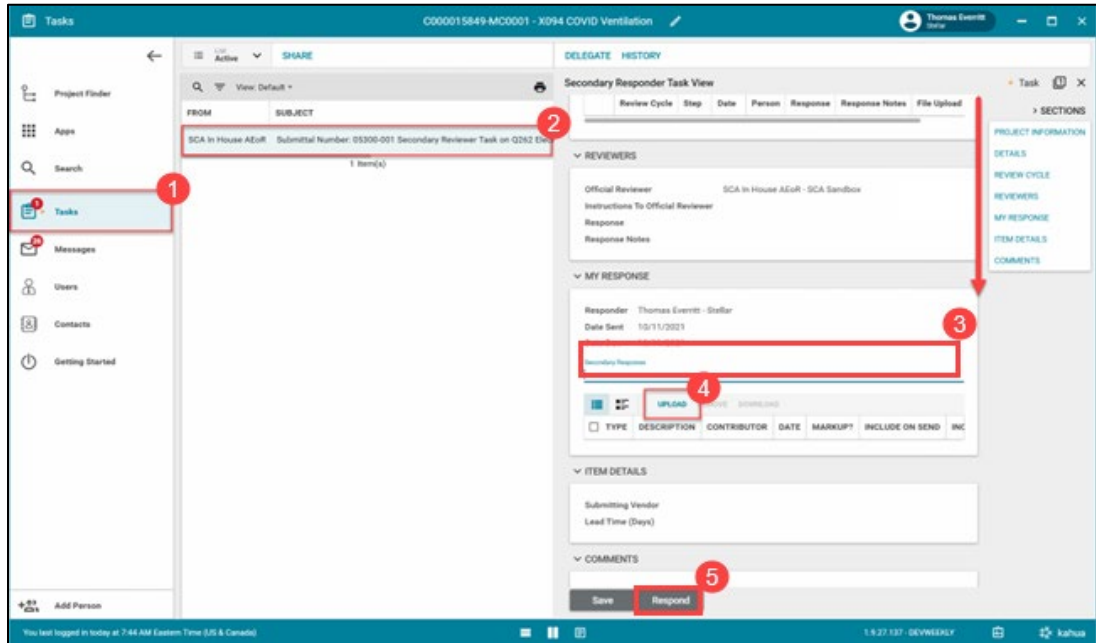
NOTE: The official Reviewer does not have to wait for the Secondary Reviewer to provide response.



Secondary Reviewer Responds to Review Cycle

The Secondary Reviewer will receive a message informing them of the review cycle.

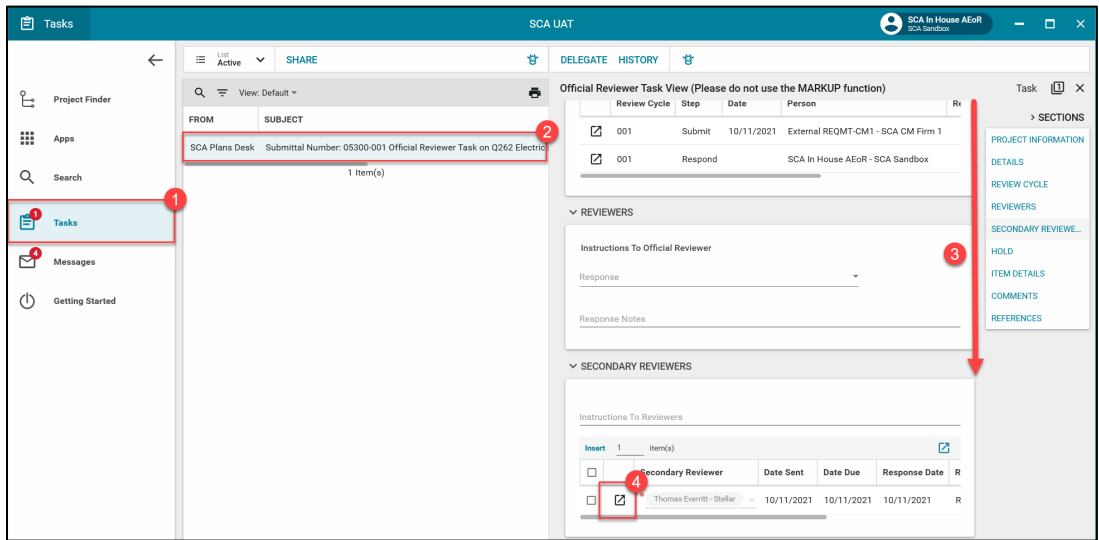
1. Click **Tasks**.
2. Select the task.
3. Scroll down to the **My Response** section and enter your response.
4. Click **Upload** to attach supporting documentation.
Note: The name of the uploaded file should start with the building ID (for example, Q262).
5. Click **Respond**.



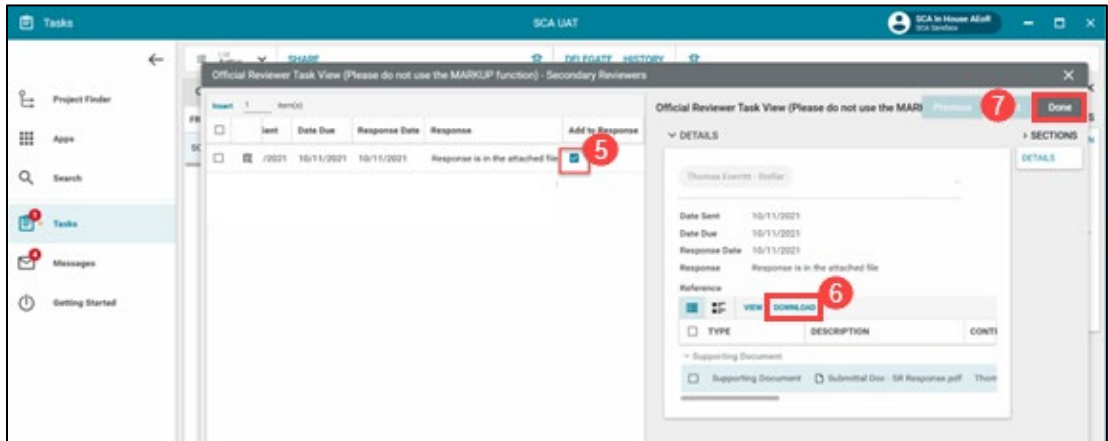
Official Reviewer adds Secondary Reviewer Response (Optional)

The Official Reviewer will receive a message informing them of the secondary reviewer response

1. Click **Tasks**.
2. Select the task.
3. Scroll down to the **Secondary Reviewers** section.
4. Click the **pop-out icon**.



5. Scroll to the right and click the **Add to Response** checkbox.
6. As needed, click **Download** to include the Secondary Reviewer documentation as additional markup or upload as the official response file.
7. Click **Done**.



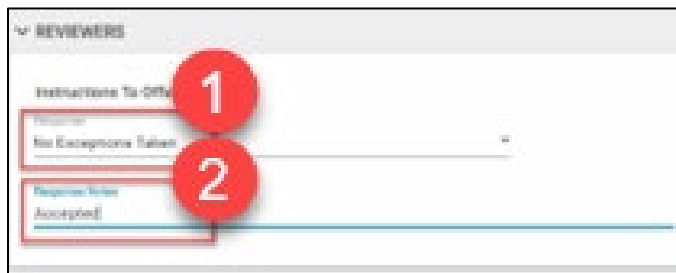
8. Click **Add Responses to Official Response Notes**.




Official Reviewer Responds to Review Cycle

Once the Official Reviewer has reviewed the attachments from the GC and has (optionally) forwarded to a secondary reviewer, they must respond to each Submittal line item.

1. Scroll down to **Reviewers** section and select a **response** from the dropdown menu:
 - a. Responses that complete the review cycle:
 - i. No Exceptions Taken.
 - ii. Make Corrections Noted.
 - iii. Reviewed: No Action Taken.
 - b. Responses that require a new review cycle:
 - i. Revise Resubmit.
 - ii. Rejected: Not Approved.
2. Enter the **Response Notes**



3. Scroll down to the Review Cycle section and Pop it out



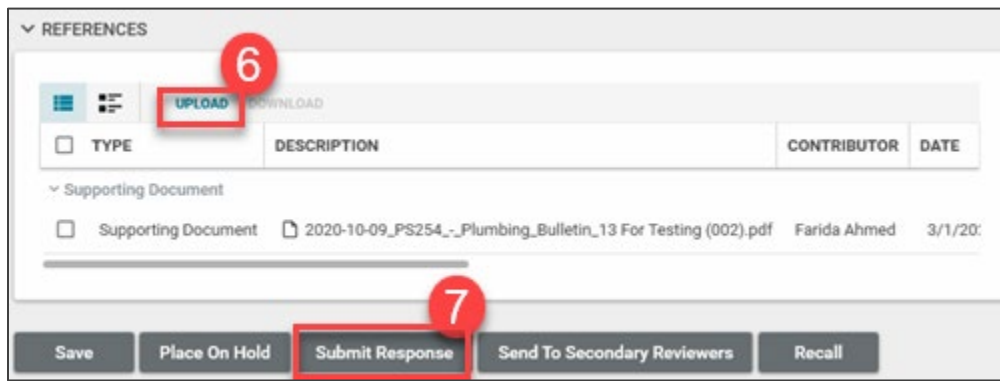
	Review Cycle	Step	Date	Person	Response	Response I
	001	Submit	3/1/2023	Kennedy External Contractor B - EJ Construction		
	001	Respond		Farida Ahmed - NYC SCA		

4. Click on the three dots, Click on select file and upload a supporting document
5. Click on Done to close the pop up

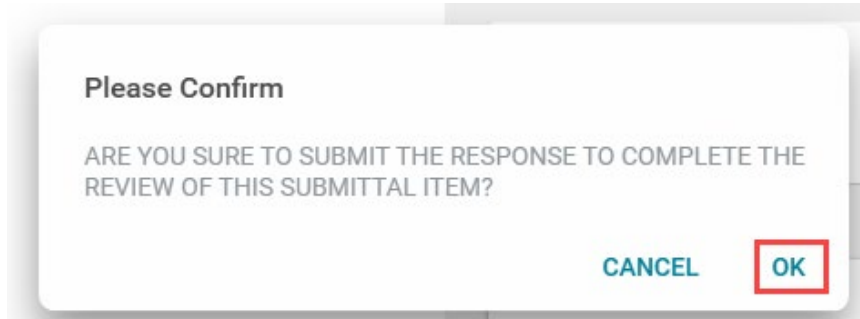


	Review Cycle	Step	Date	Person	Response	Response Notes	File Upload	File Title
	001	Submit	3/1/2023	Kennedy External Contractor B - EJ Construction				2020-10-09_PS254...
	001	Respond		Farida Ahmed - NYC SCA				

6. Scroll down to the References section and click **Upload** to attach additional supporting documents.
7. Click **Submit Response**.



You will get a popup window asking to confirm your Response. Click **OK**.



GC Starts a New Review Cycle

GC will receive a message when a submittal item has been returned. They can start a New Review Cycle for that item.

1. Navigate to the desired submittal.
2. Select the **Submittal line item** to start a new review cycle.
3. Click **New Review Cycle** to unlock the record.
4. Click **Edit**.
5. Pop out the **Review Cycle** section and add supporting documentations and comments.
6. Click **Done**.

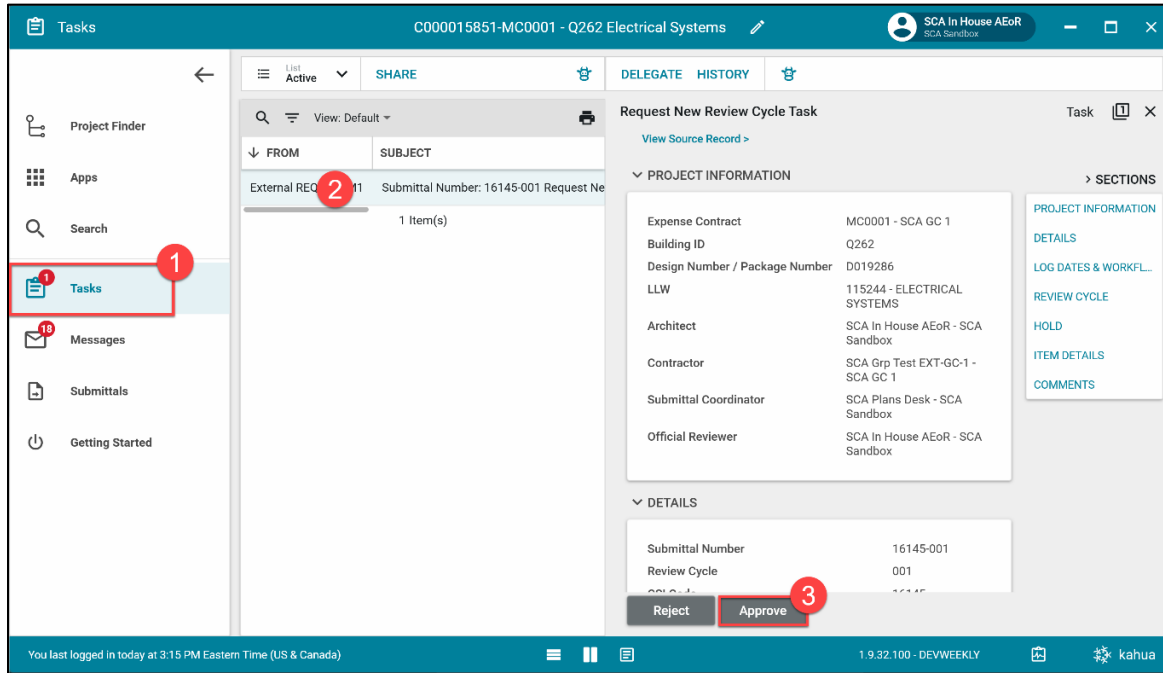
The screenshot displays the 'Submittals' application interface. On the left, a navigation sidebar includes 'Project Finder', 'Apps', 'Search', 'Tasks', 'Messages', 'Submittals' (highlighted with a red circle 1), and 'Getting Started'. The main area shows a table of submittals with columns: Submittal Number, Review Cycle, Section Title, Submittal Title, and Submittal Status. The row for submittal 05300-001 is highlighted with a red box and a red circle 2. Above the table, there are 'NEW' and 'EDIT' buttons, with the 'EDIT' button highlighted by a red box and a red circle 4. To the right, a 'Go View' section contains 'PROJECT INFORMATION' and 'DETAILS' panels. The 'DETAILS' panel shows fields like Submittal Number, Review Cycle, CSI Code, Section Title, Submittal Title, Category, Type, Building ID, and Status. At the bottom of the details panel, a 'REVIEW CYCLE' section contains a 'New Review Cycle' button highlighted with a red box and a red circle 3. The bottom status bar shows the user is logged in at 8:14 AM Eastern Time (US & Canada) and the date is 1/9/2017.

7. Click **Save/Close**.
8. Click **Submit for Review**.

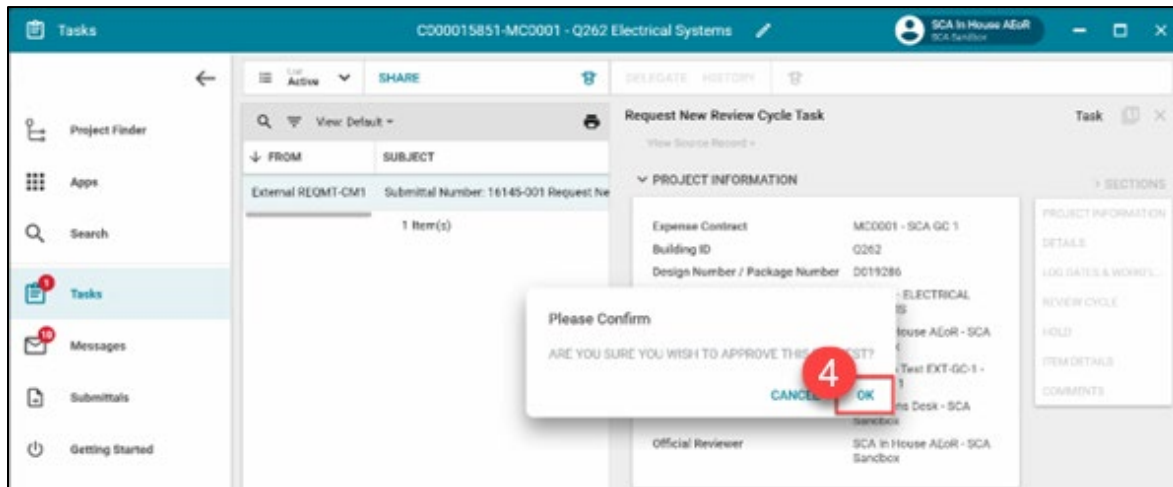
PO or AEoR Approves New Review Cycle

The Original Reviewer will receive a message informing about the New Review Cycle.

1. Click **Tasks**.
2. Select the task.
3. Click **Approve**. If you click **Reject**, the submittal is returned to the GC and the review cycle starts over again. See [Exceptions](#) for instructions on how to restart the review cycle.



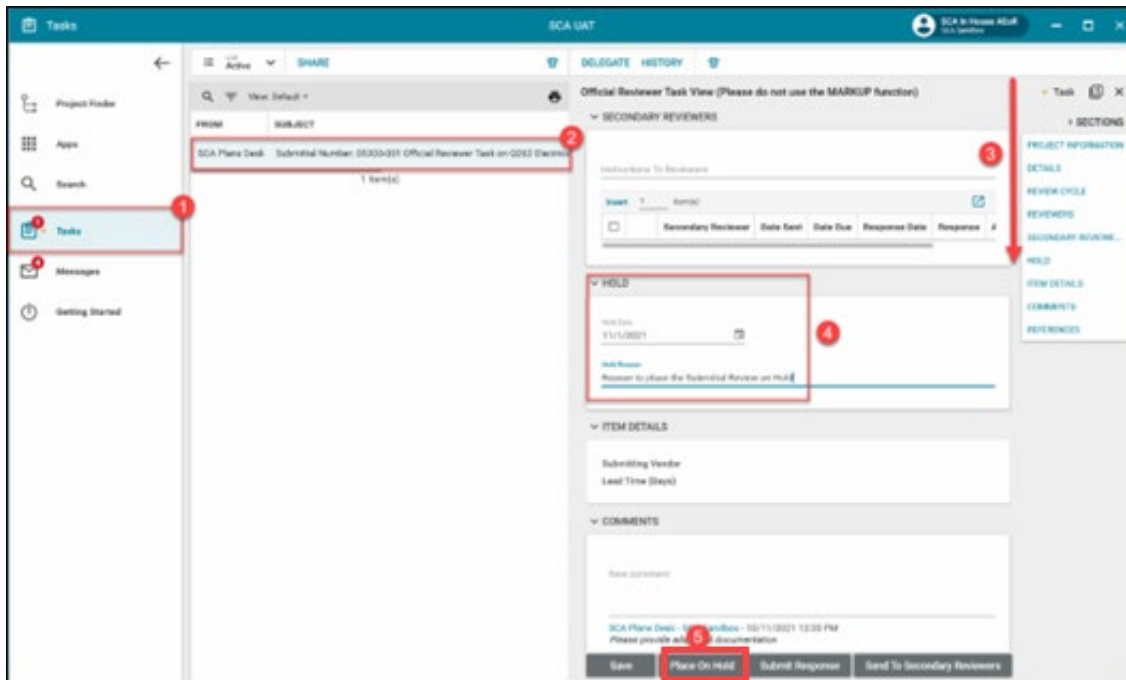
4. Click **OK** to confirm.



Review Cycle on Hold

Official Reviewer has the option to place a Review Cycle on hold for 30 days.

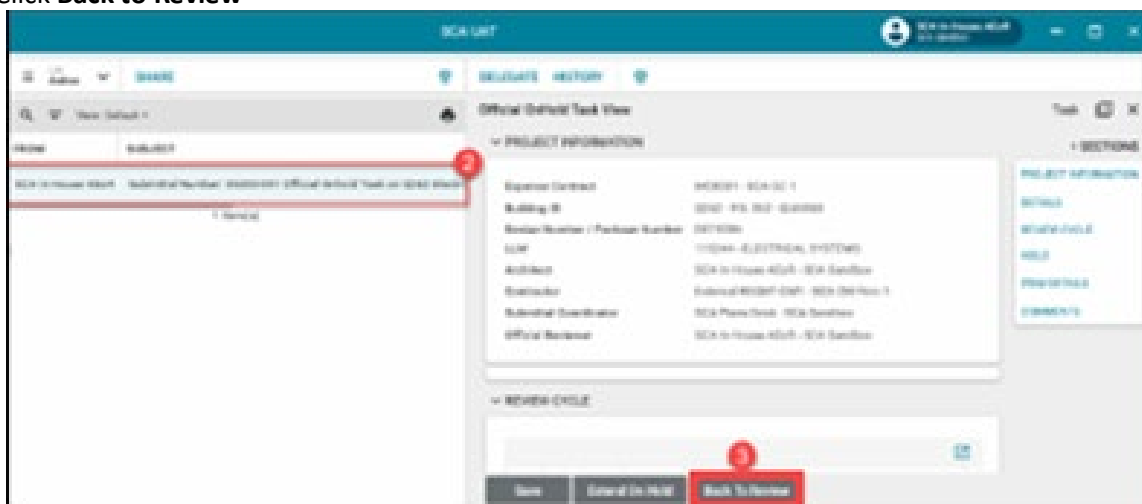
1. Navigate to **Submittals**.
2. Click desired **Submittal line item**.
3. Scroll down to the **Hold** section.
4. Enter the hold information.
5. Click **Place on Hold**.



Review Cycle Hold Removed

Official Reviewer removes the hold.

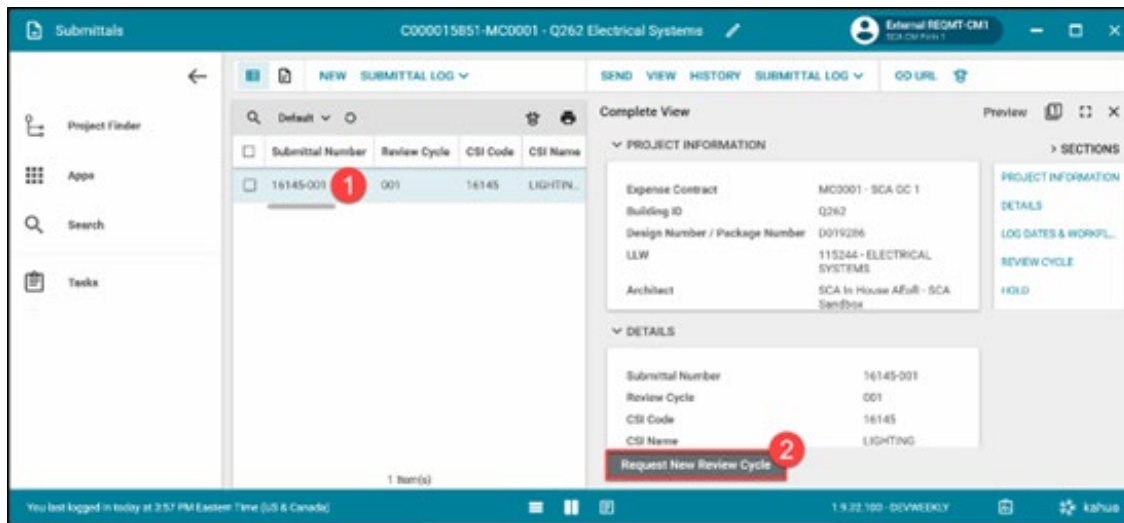
1. Navigate to the Submittal
2. Select the Submittal line-item Review Cycle that was previously placed on Hold.
3. Click **Back to Review**



New Review Cycle Request

GC can request a New Review Cycle for any Returned or Completed Submittal Line Item.

1. Navigate to the Submittal line item.
2. Click **Request New Review Cycle**.

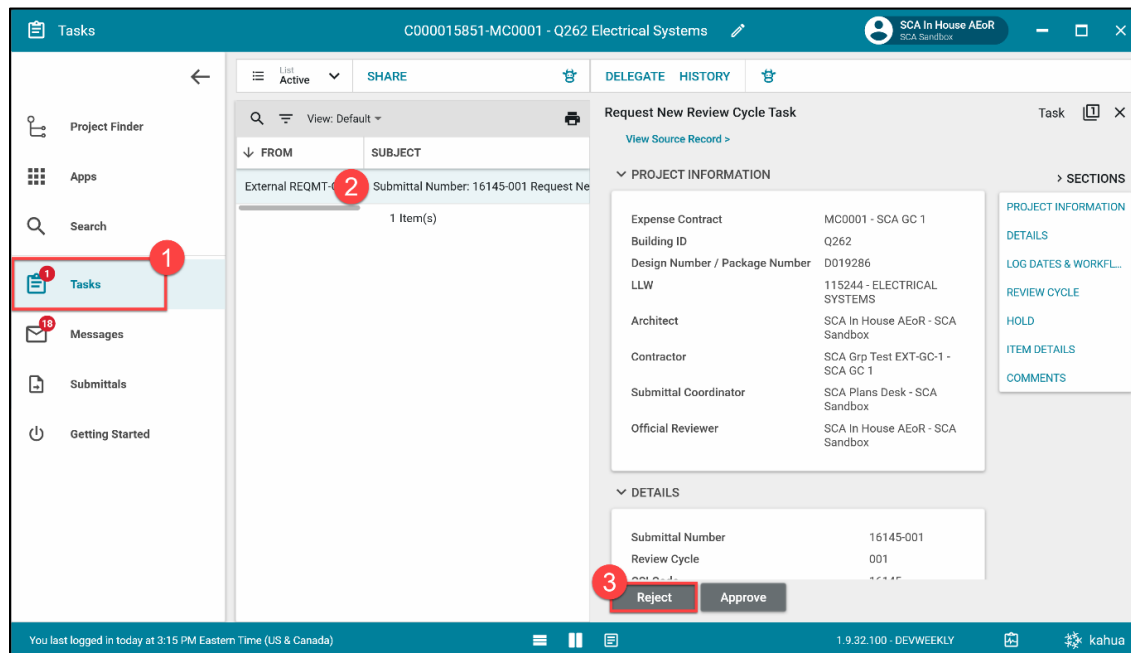


The next steps are like the first [Review Cycle](#).

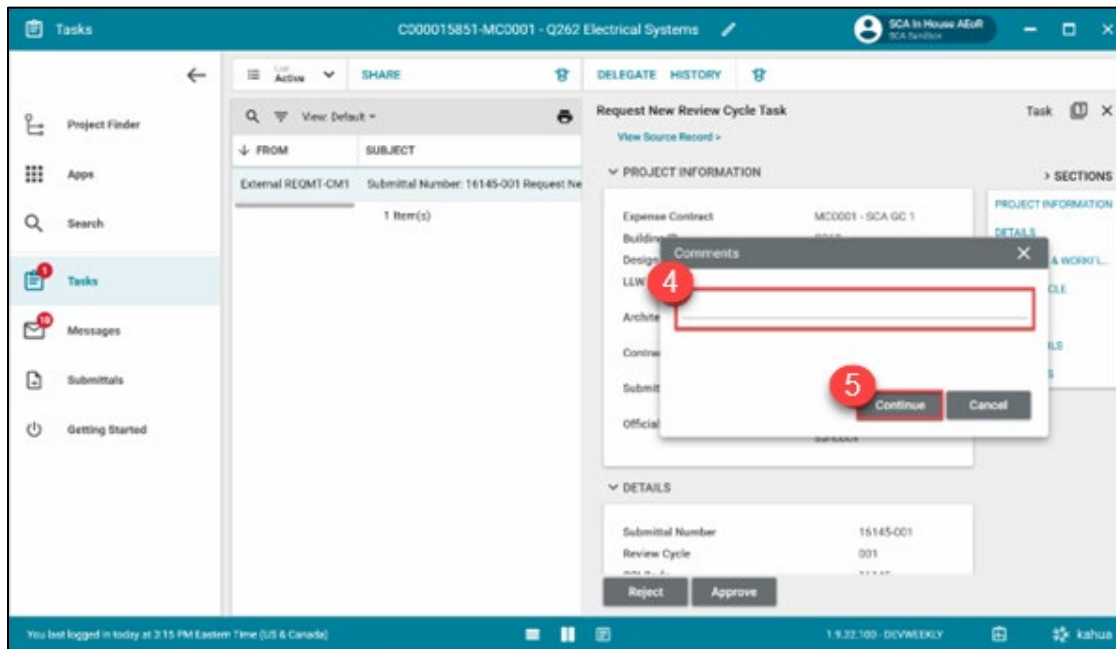
New Review Cycle Reject

The Original Reviewer or the Submittal Coordinator will receive a message informing about the New Review Cycle.

1. Navigate to Messages. It will take you to the Task or Click Tasks.
2. Select the task.
3. Click **Reject**.



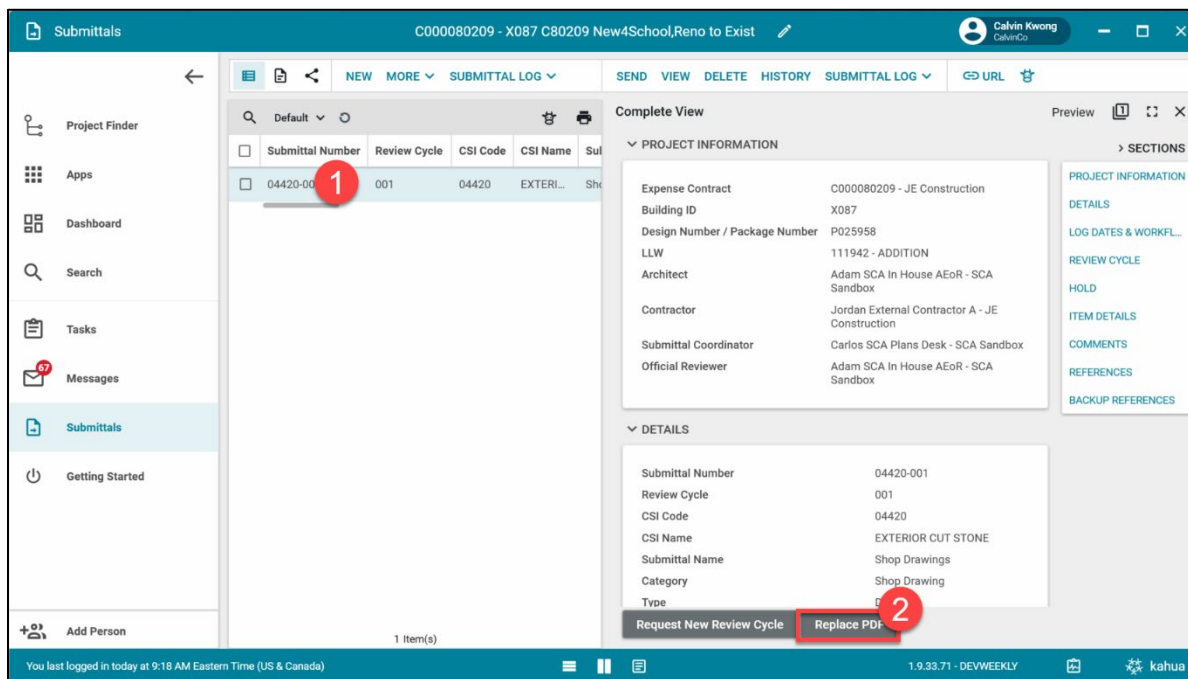
4. Enter the reason for rejection.
5. Click Continue.



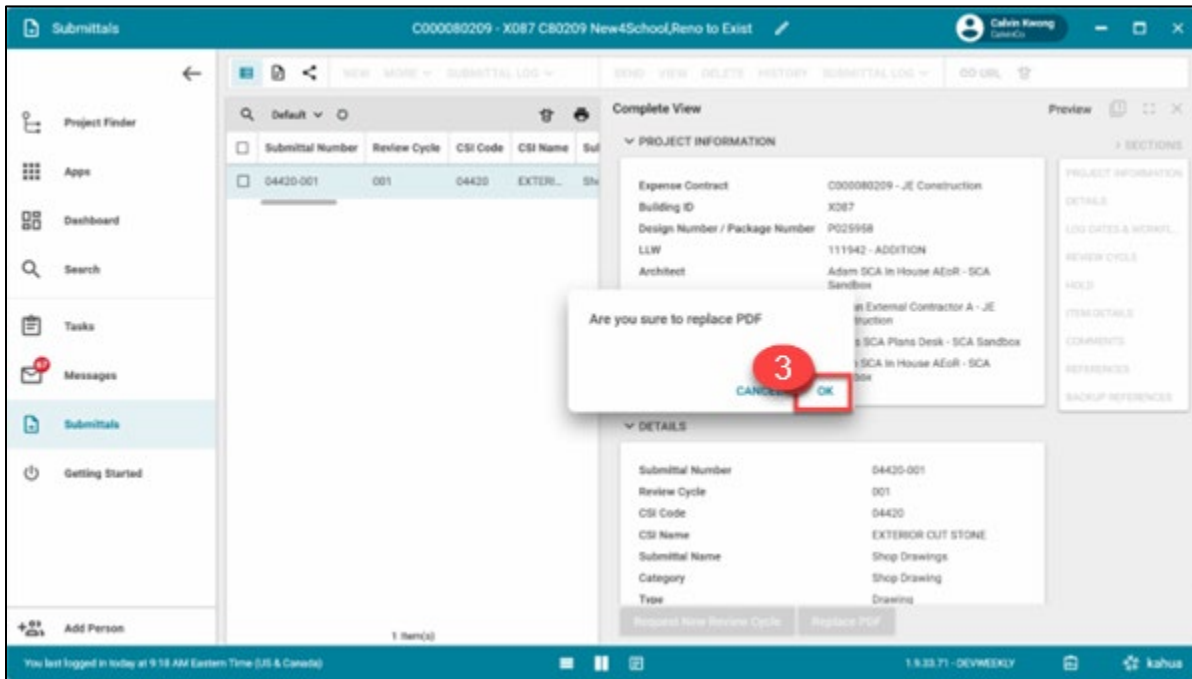
Replacing PDF of Completed Submittal

Official Reviewer can update documents in the reference section of the Completed Submittal line time.

1. Navigate to the desired **Submittal**.
2. Click **Replace PDF**.

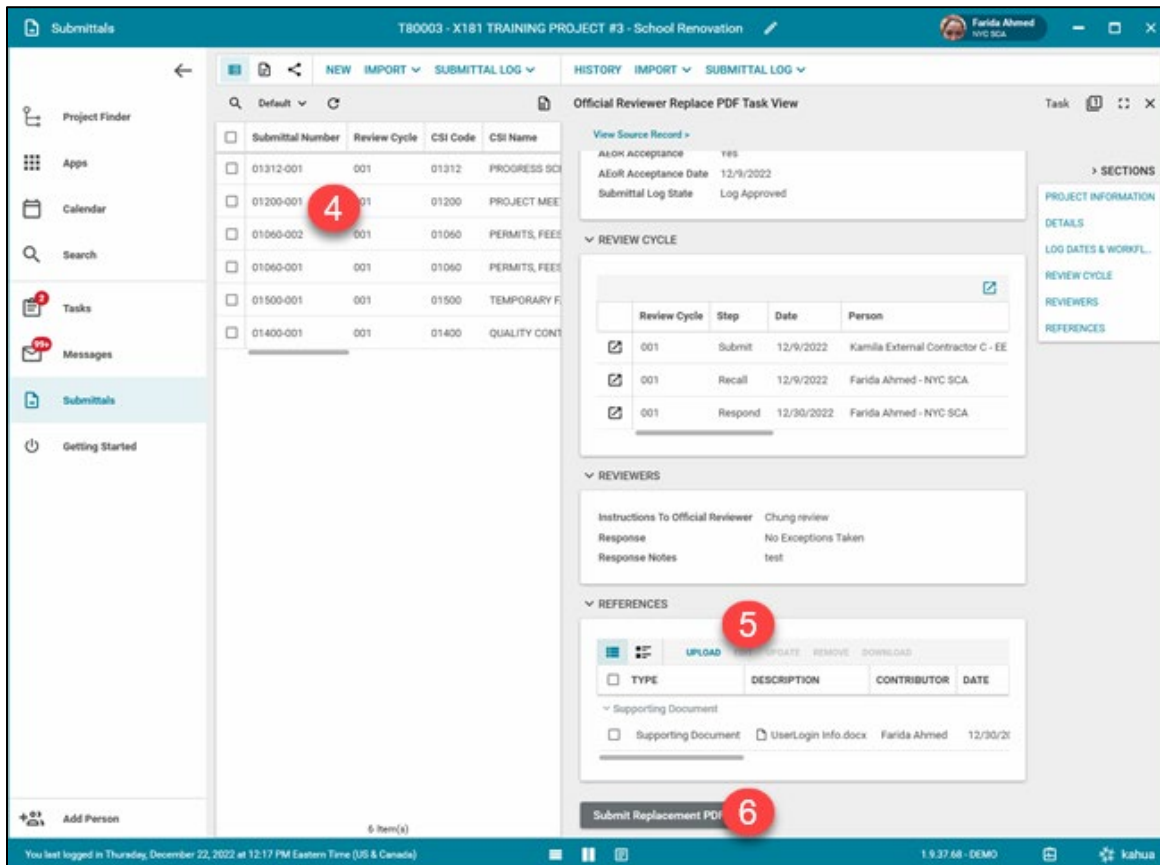


3. Click **OK** to confirm. This will unlock the Submittal line item.

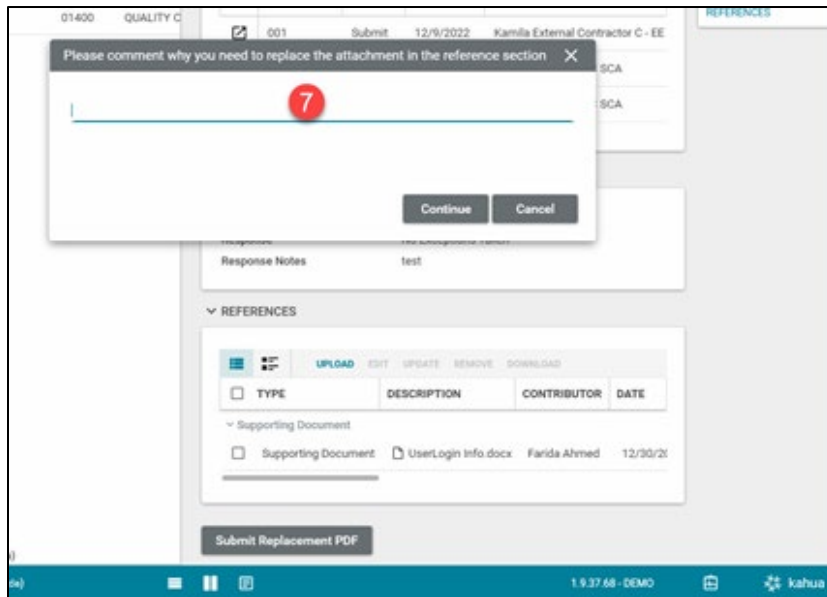


4. Open the Submittal Line Item.
5. **Upload** documentation in the References section.
6. Click **Submit Replacement PDF**.

Note: To remove a file, Click the file description and then select **Remove** at the top of the table.



7. Add reason why the PDF is being replaced and click **Continue**.



Recall Submittal

The Official Reviewer, Submittal Coordinator, Admin and Moderator can recall Submittal line items. Recalling a line item returns it one step back in the approval/review process.

1. Navigate to Submittals and select the desired submittal.
2. Click **Recall**.
3. Click **OK**, to confirm.

