



Hard Bid  
Submittals User Guide

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## 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 AEOR 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.

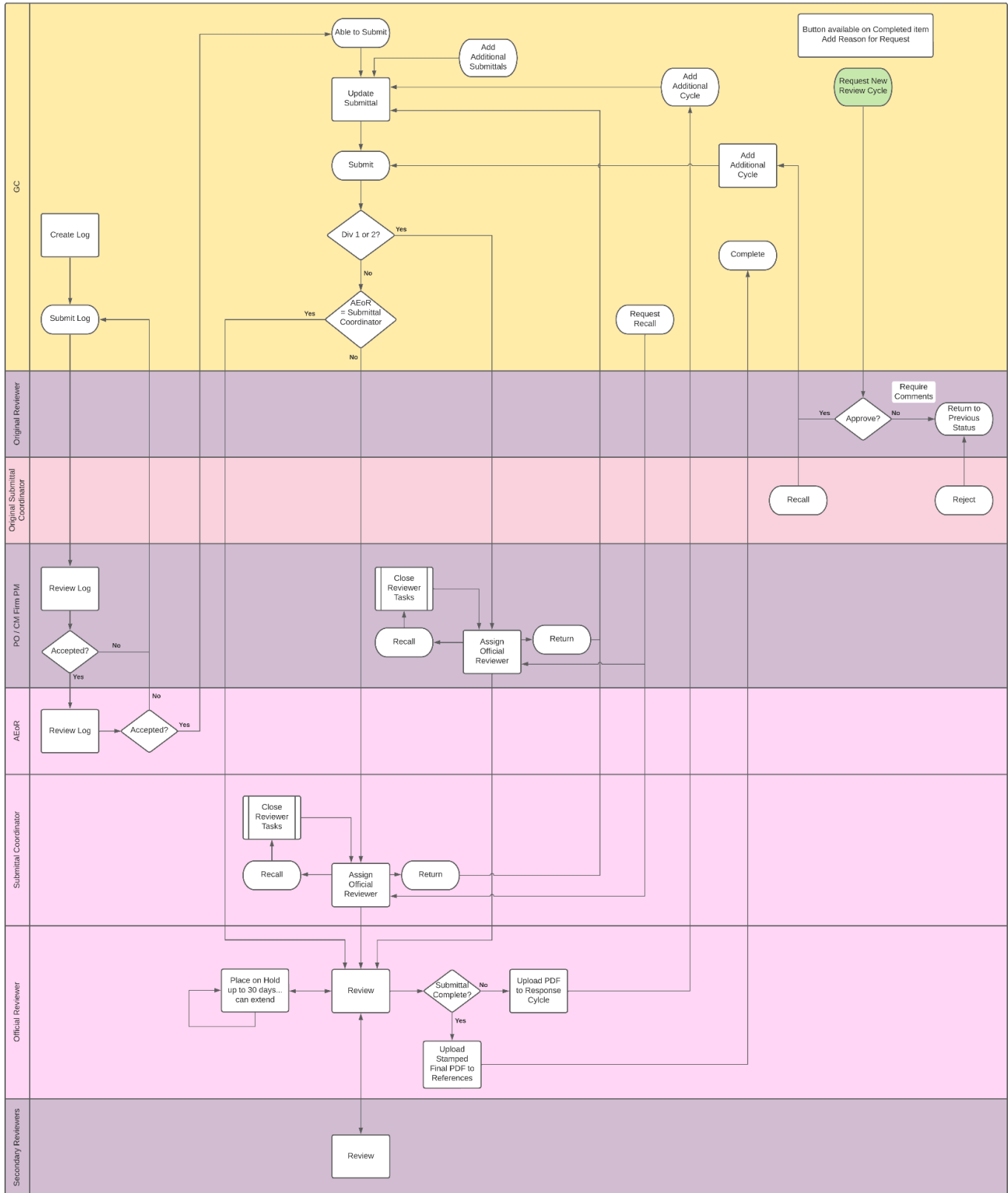
- No Exceptions Taken
- Make Corrections Noted
- Reviewed: No Action Taken

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

Go to **Project Finder** and select the desired contract.

The screenshot shows the Kahua Project Finder interface. The left sidebar contains a list of apps: 'Apps', 'Project Finder' (highlighted with a red box), 'Dashboard', 'Calendar', and 'Search'. The main content area shows a breadcrumb trail: 'SCA Training > Hard Bid > Queens > District 24'. Below this is a table with columns 'Number' and 'Name'. A row is highlighted with a red box: 'C000080001 Q246 - QUEENS - 39-20 48TH AVENUE (P.S. 199) TRAINING P..'

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

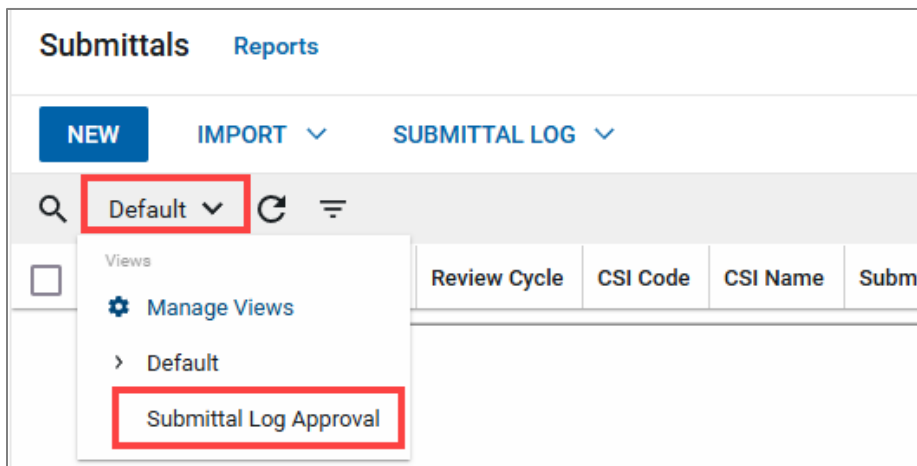
The screenshot shows the Kahua Submittals interface. The left sidebar contains a list of apps: 'Apps' (highlighted with a red box), 'Project Finder', 'Calendar', and 'Search'. The main content area shows a list of apps: 'Recent', 'All Apps' (highlighted with a red box), 'Administration', and 'Cost Management'. A search bar is visible with the text 'Subm'. Below the list of apps, the 'Submittals' option is highlighted with a red box.

3. Click **New** at the top

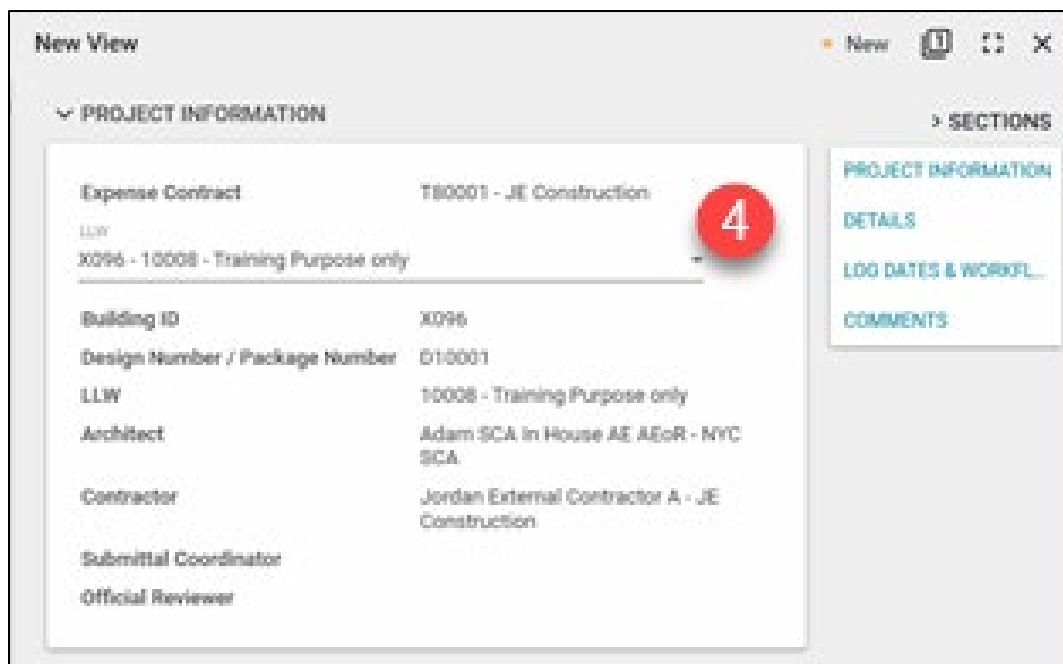
The screenshot shows the Kahua Submittals interface. The top bar shows 'T80001 - X096 TRAINING PROJECT #1- School Renovation' and 'Submittals'. The main area shows 'Submittals' and 'Reports' tabs. Below the tabs is a 'NEW' button and an 'IMPORT' dropdown menu. A 'SUBMITTAL LOG' dropdown menu is also visible. At the bottom, there is a search bar with the text 'Default' and a refresh button.

4. Click the **Default** dropdown menu to change the log view.
5. Select **Submittal Log Approval**.

**NOTE:** You must be in this view to submit.



6. 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.



7. Select the **CSI Code** from the dropdown menu.
8. 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.

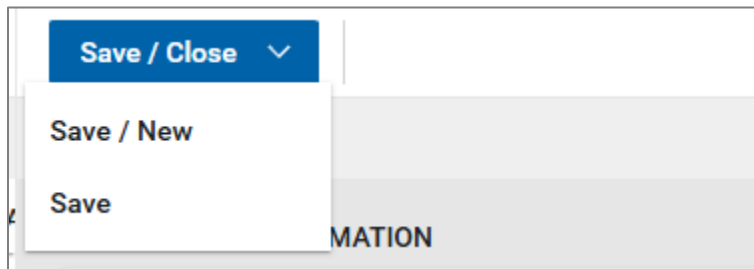
**DETAILS**

CSI Code  
01060 PERMITS, FEES, AND CERTIFICATES OF OCCUPANCY 5

CSI Name PERMITS, FEES, AND CERTIFICATES OF OCCUPANCY

Submittal Name  
Permits 6

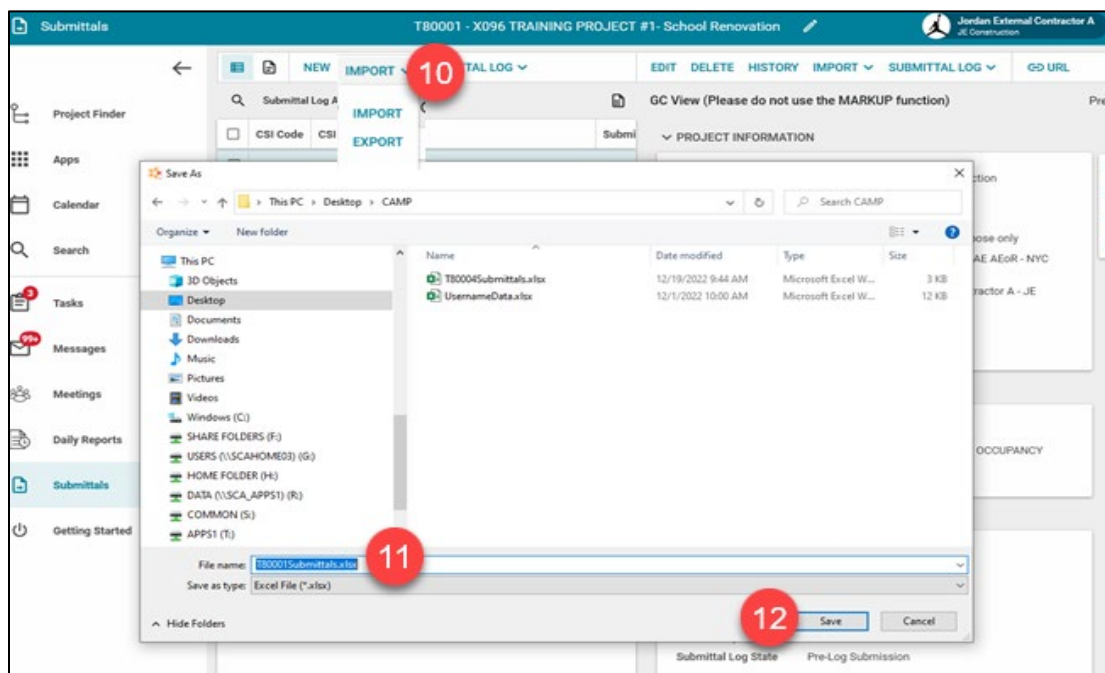
- Click **Save/Close** or select **Save/New** from the dropdown menu to start the second line item.



### Import Excel File Submittal Log

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

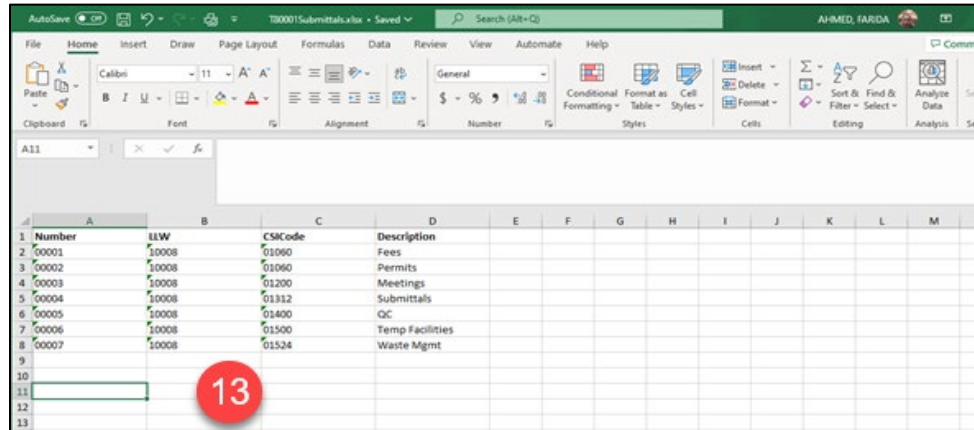
- Click the **Import** dropdown menu and select **Export**.
- Name** the file.
- Save** the file.



11. 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:**

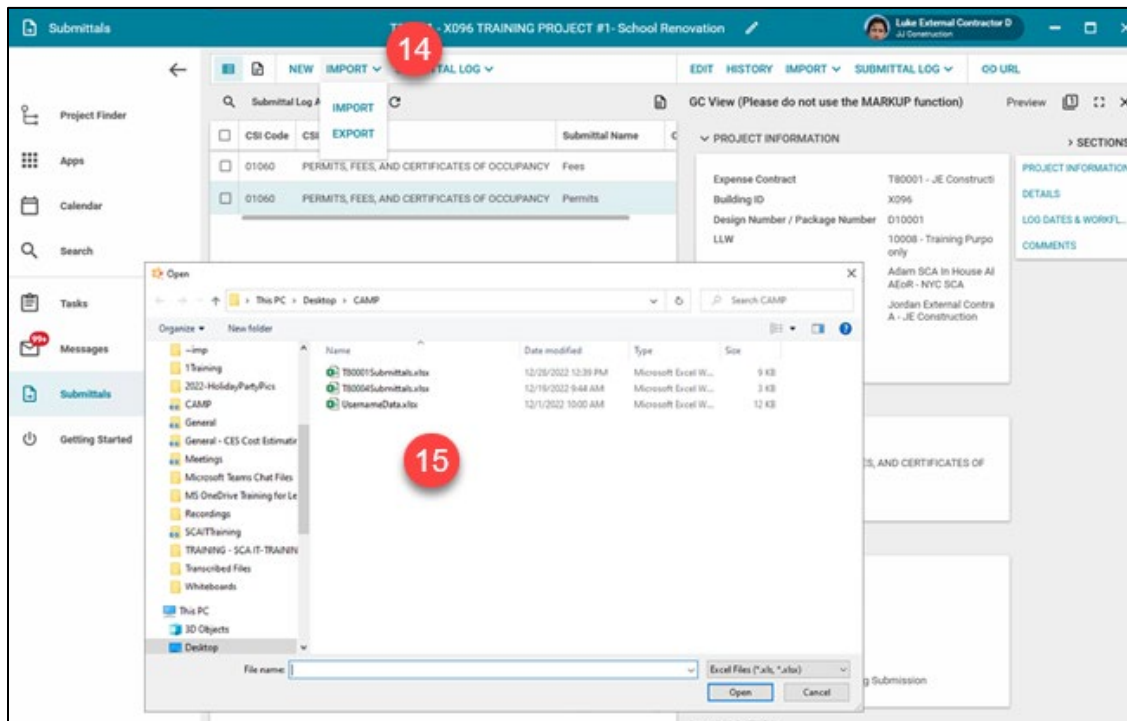
- **DO NOT** change the cell formatting
- **DO NOT** add additional columns
- **DO NOT** re-arrange columns
- **DO NOT** re-name the excel sheet



12. **SAVE AND CLOSE THE EXCEL FILE.** You cannot import the file if it is still open.

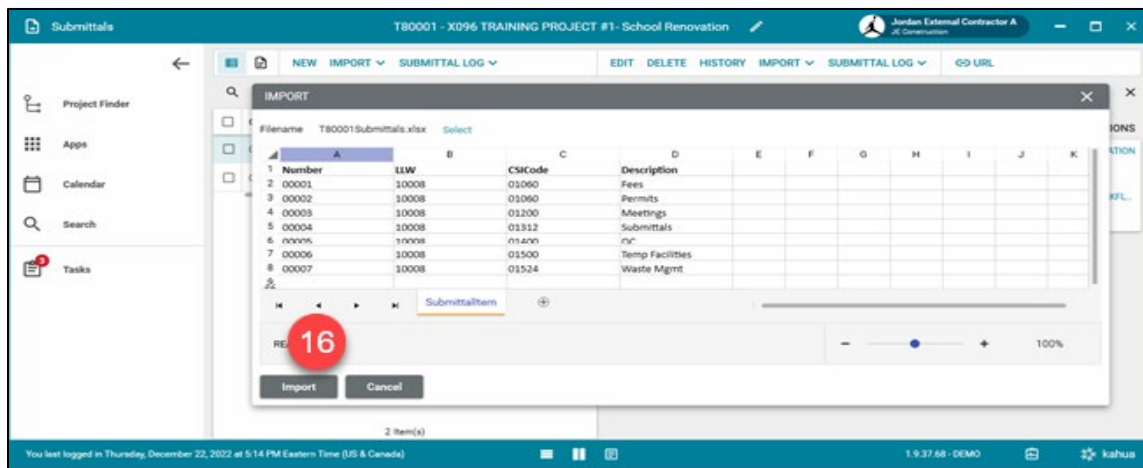
13. In **Kahua**, click the **Import** dropdown menu and select **Import**.

14. Browse to the location of the file, select the file, and click **Open**.

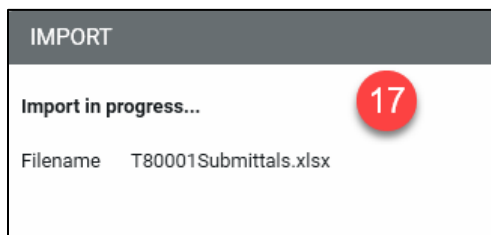




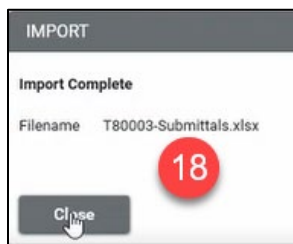
15. Click **Import**.



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



17. 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.

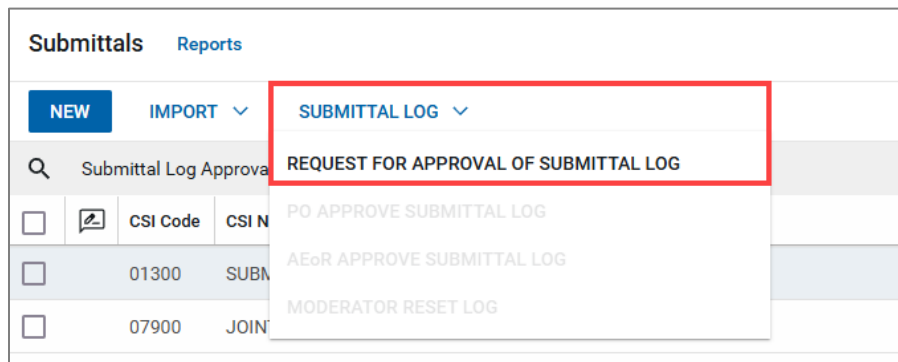
### GC Submits the Log to the PO

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:

18. Select *any* submittal item. **Do not check the box!**

19. Click the **Submittal Log** dropdown menu.

20. Select **Request for Approval of Submittal Log**.



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

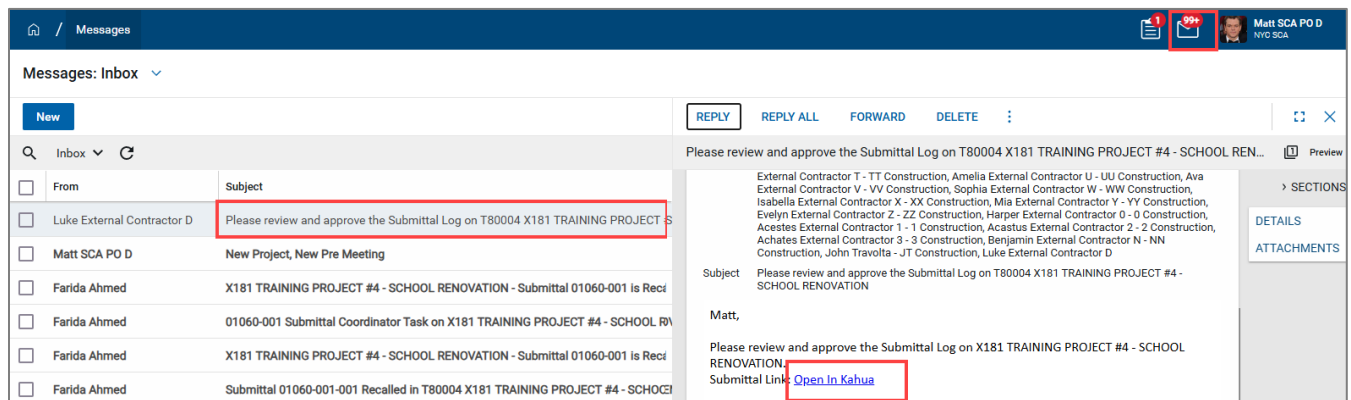


## PO Approves the Submittal Log

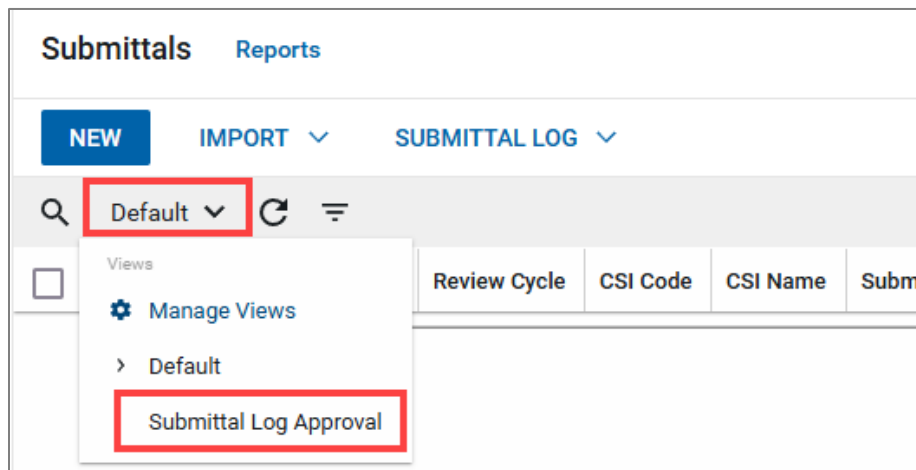
- The PO will receive a message to review and approve the Submittal Log.
- Once the PO approves, the AE will receive a message informing them of the submittal log approval request.

1. To access the submittal log, open the **Submittals** app, or:

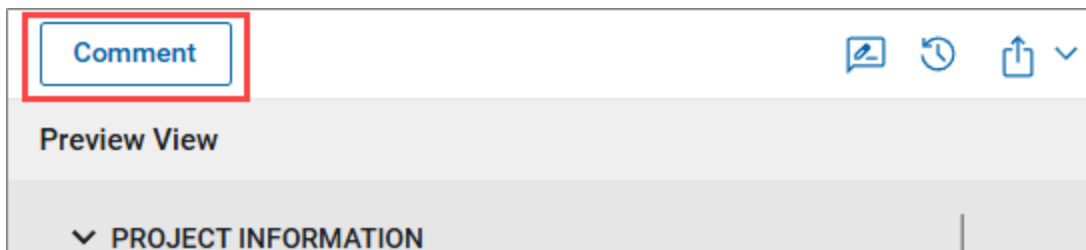
- Navigate to **Messages** in the top right corner
- Select the **Submittal Log approval message**.
- Click the **Open in Kahua** link.



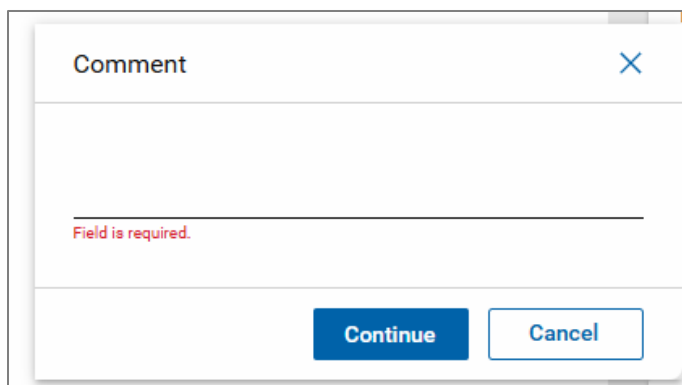
- Click the **Default** dropdown menu and select the **Submittal Log Approval** view.



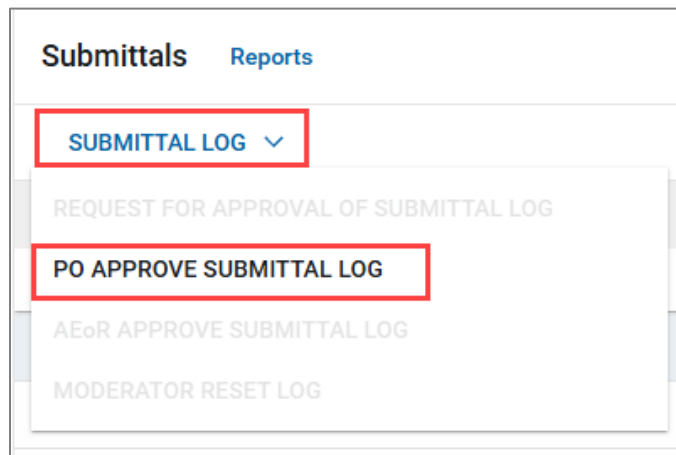
- Review the log by selecting a submittal line item.
- If you wish to add a comment to the line item, click **Comment** at the top of the record.



- Enter your **comments** for that individual item
- Click **Continue**



- To approve the entire Submittals Log, click on **one of the Submittal items**. **Do not check the box!**
- Click the **Submittal Log** dropdown menu.
- 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.

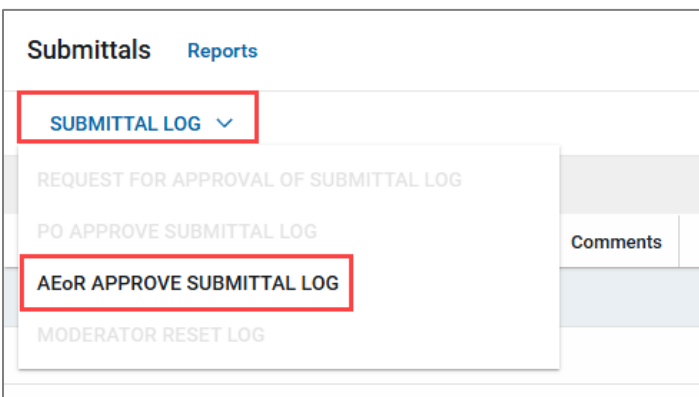
A screenshot of a 'Approve Submittal Log' popup window. The window has a title bar 'Approve Submittal Log'. Inside, there is a section with the text 'PLEASE CHECK IF YOU WANT TO APPROVE THE SUBMITTAL LOG'. Below this text is a text input field labeled 'PO Comment' (highlighted with a red box). At the bottom of the window, there are two buttons: 'PO Approve Submittal Log' (highlighted with a red box) and 'PO Reject Submittal Log'.

## 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](#).

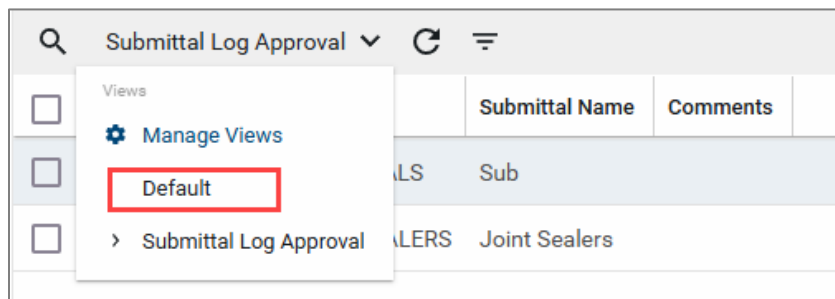
**NOTE:** Step #9: click **AEoR Approve Submittal Log**



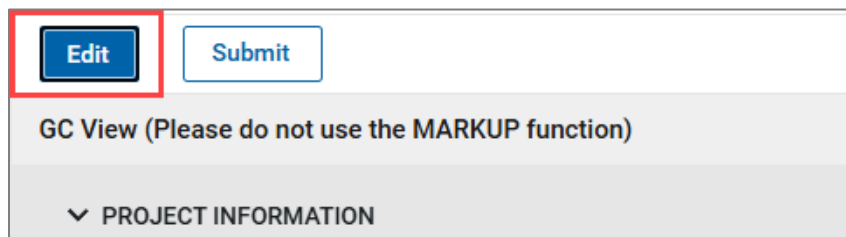
## GC Initiates the Submittals Review Cycle

**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

6. Click **one** of the three checkboxes

▼ DETAILS

Submittal Number 01300-001  
Review Cycle 001  
CSI Code  
01060 PERMITS, FEES, AND CERTIFICATES OF OCCUPANCY

CSI Name PERMITS, FEES, AND CERTIFICATES OF OCCUPANCY  
Submittal Name  
Permits

Category  
Product Data

Type  
As Built

☐ Or Equal Substitution / Non-basis of Design  
☒ Per Spec / Basis of Design  
☐ Alternate Substitution

Status Draft

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

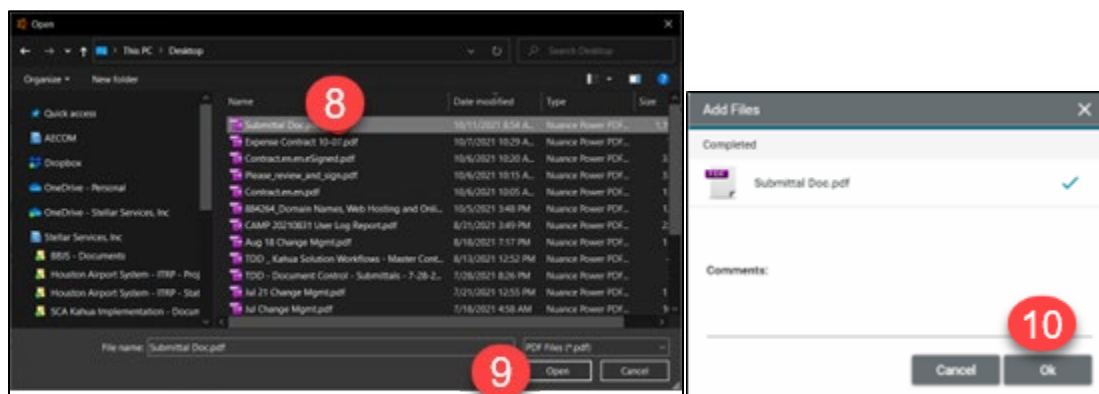
▼ REVIEW CYCLE

	Review Cycle	Step	Date	Person	Response	Response Notes	File Upload	File Title
	001	Submit					<u>Drawing.pdf</u> ...	

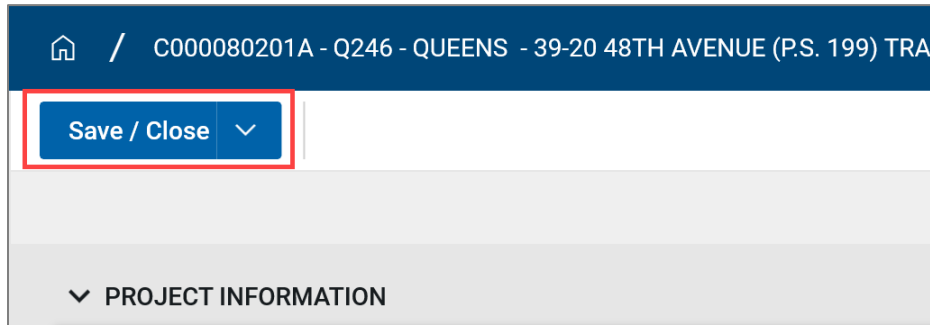
8. Select the file to upload (the name of the uploaded file should start with the building ID (for example, Q262)).

9. Click **Open**

10. Click **Ok**



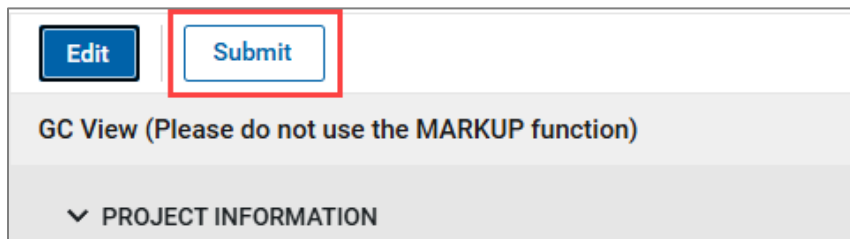
11. Click **Save / Close**



A screenshot of a web interface showing a project information form. At the top, there is a blue header bar with a home icon, a slash, and the text 'C000080201A - Q246 - QUEENS - 39-20 48TH AVENUE (P.S. 199) TRA'. Below the header, there is a white box containing a blue button labeled 'Save / Close' with a dropdown arrow. This button is highlighted with a red rectangular border. Below the button, there is a grey section labeled 'PROJECT INFORMATION' with a dropdown arrow.


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

12. Click **Submit**




A screenshot of a web interface showing a project information form. At the top, there is a white box containing two blue buttons: 'Edit' and 'Submit'. The 'Submit' button is highlighted with a red rectangular border. Below the buttons, there is a grey section labeled 'GC View (Please do not use the MARKUP function)'. Below this, there is another grey section labeled 'PROJECT INFORMATION' with a dropdown arrow.

The Submittal will now go to the following role, who will review the submittal and assign an Official Reviewer. You will see the submittal status as Pending Assignment and who is responsible for the assignment.

Submittals Reports									
NEW IMPORT SUBMITTAL LOG									
Default									
<input type="checkbox"/>		Submittal Number	Review Cycle	CSI Code	CSI Name	Submittal Name	Status	Response	Assigned To
<input type="checkbox"/>		01060-001	001	01060	PERMITS, FEES, AND CERTIFICATES OF OCCUPANCY	Permits	Pending Assignment		Matt SCA PO D - NYC SCA

- 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.

GC can also click Request Recall if they want the submittal item returned to them, if it has not been moved forward in the process



A screenshot of a web interface showing a project information form. At the top, there is a blue header bar. Below the header, there is a white box containing a blue button labeled 'Request Recall'. Below the button, there is a grey section labeled 'GC View (Please do not use the MARKUP function)'.

## 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** in the top right
2. Select the task.

Tasks: Active

From: Luke External Contractor D Subject: Submittal Number: 01060-001 Submittal Coordinator Task on X181 TRAIN

Matt SCA PO D Replace PDFs on Submittal 01060-003-001 in T80014 X181 TRAINING PR

Submittal Coordinator Task View (Please do not use the MARKUP function)

PROJECT INFORMATION

Expense Contract C000080004 - Stellar Services

SECTIONS

PROJECT INFORMA... DETAILS

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** at the top

Save Send To Official Reviewer Return

Submittal Coordinator Task View (Please do not use the MARKUP function)

Review Cycle	Step	Date	Person
001	Submit	4/25/2025	Luke External Contractor D - JJ Construction

REVIEWERS

Official Reviewer

Instructions To Official Reviewer

Response

Response Notes



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

## 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**

Tasks: Active

Save Place On Hold Submit Response

Official Reviewer Task View (Please do not use the MARKUP function)

REVIEWERS

Instructions To Official Reviewer Instructions to Official Reviewer

Response

Response Notes

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

REVIEW CYCLE								
	Review Cycle	Step	Date	Person	Response	Response Notes	File Upload	File Title
	001	Submit	4/25/2025	Luke External Contractor D - JJ Construction				Drawing.pdf
	001	Respond		Matt SCA PO D - NYC SCA				

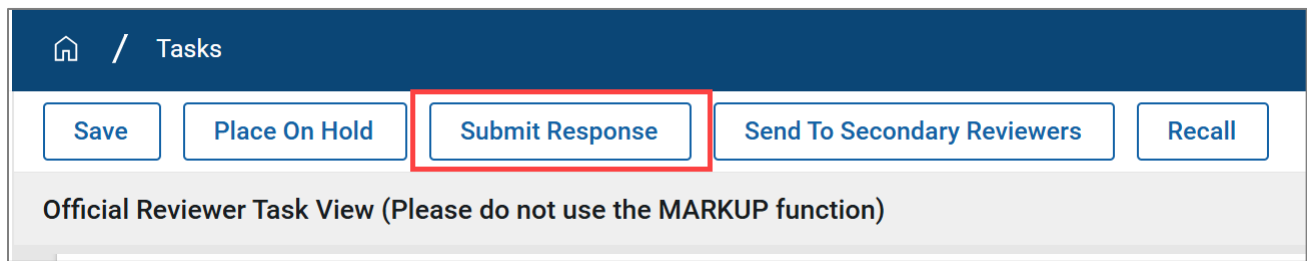
5. **REQUIRED:** You must **Upload** the same document from the Review Cycle in the **References Section** at the bottom

REFERENCES

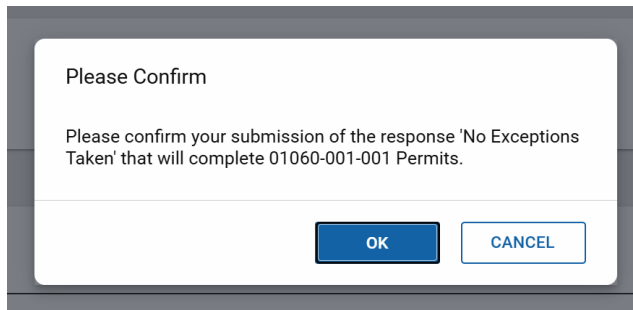
UPLOAD REMOVE DOWNLOAD

TYPE	DESCRIPTION	CONTRIBUTOR	DATE	SIZE
Supporting Document				

- Click **Submit Response** at the top



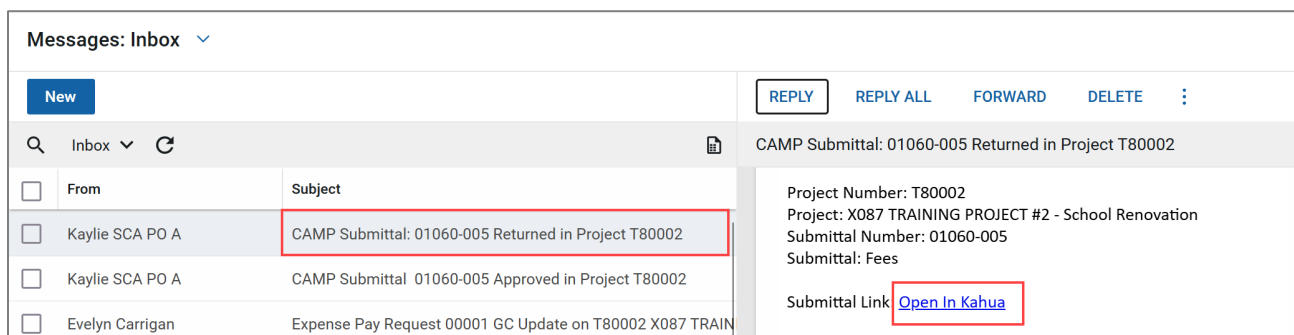
You will get a popup window asking to confirm your Response. Click **OK**.



## Returned Submittal: GC Starts a New Review Cycle

The GC will receive an email message when the Official Reviewer returns a submittal item. The GC can start a New Review Cycle for that item.

- Go to Messages> Select the message> click **Open in Kahua**



- Select the **Submittal line item** to start a new review cycle.
- Click **New Review Cycle** to unlock the record.

Submittals [Reports](#)

**NEW** [IMPORT](#) [SUBMITTAL LOG](#)

GC View (Please do not use the MARKUP function)

Submittal Number	Review Cycle	CSI Code	CSI Name
01060-005	001	01060	PERMITS, FEES, AND CERTIFICATES OF C...
01010-001	001	01010	SUMMARY OF WORK

PROJECT INFORMATION

Expense Contract C000080301 - JE Construction

4. Click **Edit**

**Edit** **Submit**

GC View (Please do not use the MARKUP function)

PROJECT INFORMATION

5. **Review Cycle** section: click the ellipses button to add supporting documentations and comments.

GC Submission Date 4/3/2024  
PO Acceptance Yes  
PO Acceptance Date 4/4/2024  
AEoR Acceptance Yes  
AEoR Acceptance Date 4/15/2024  
Submittal Log State Log Approved

REVIEW CYCLE

Step	Date	Person	Comments
Submit	4/25/2025	Jordan External Contractor A - JE Construction	
Recall	4/25/2025	Kaylie SCA PO A - NYC SCA	Recalled Make corrections noted
Respond	4/25/2025	Kaylie SCA PO A - NYC SCA	Rejected: Not Approved Rejected
Submit			

Add Files

Completed

Backing Documentation.pdf

Comments:

**Ok** **Cancel**

File Upload File Title

Backing

Backing

Backing

...

6. Click **Save/Close**

7. Click **Submit**

**←** **Edit** **Submit**

GC View (Please do not use the MARKUP function)

## 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 **Continue** to confirm.

The screenshot shows the 'Submittals' tab in a software interface. At the top, there are buttons for 'NEW', 'IMPORT', and 'SUBMITTAL LOG'. To the right of these buttons are 'Approve' and 'Reject' buttons, with the 'Approve' button highlighted by a red rectangle. Below the buttons is a search bar and a table with columns: Submittal Number, Review Cycle, CSI Code, and CSI Name. The first row of the table contains the values: 01010-001, 001, 01010, and SUMMARY OF WORK. On the right side of the interface, there is a 'Complete View' section and a 'PROJECT INFORMATION' section.

The screenshot shows a 'Reason for Return' dialog box. It has a title bar with a close button (X). Inside the dialog, there is a text input field labeled 'Reason'. Below the input field, there is a red error message that says 'Field is required.' At the bottom of the dialog, there are two buttons: 'Continue' and 'Cancel'.

## 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 Date** and **Hold Reason**.

The screenshot shows the 'HOLD' section of the Submittals interface. It has a title bar with a dropdown arrow and the word 'HOLD'. Below the title bar, there is a form with two input fields: 'Hold Date' and 'Hold Reason'. The 'Hold Date' field has a calendar icon next to it.

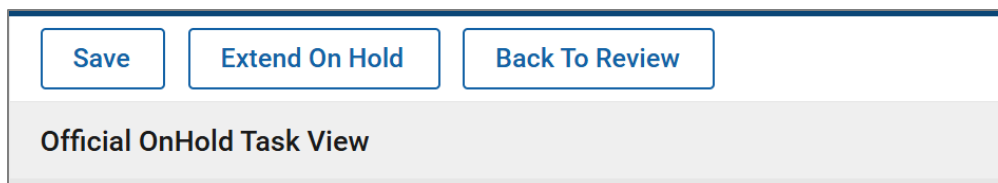
5. Click **Place on Hold**.



### Review Cycle Hold Removed

Official Reviewer removes the hold.

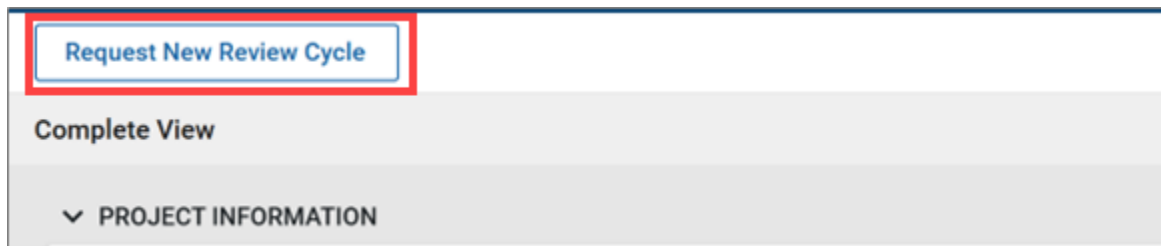
1. Navigate to the Submittal
2. Select the Submittal line-item Review Cycle that was previously placed on Hold.
3. To extend the hold, click **Extend on Hold**, or
4. Click **Back to Review** to remove the Hold



### 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**.

The screenshot shows the 'Submittals' tab in a software interface. At the top, there are buttons for 'NEW', 'IMPORT', and 'SUBMITTAL LOG'. To the right, there are 'Approve' and 'Reject' buttons, with the 'Reject' button highlighted by a red rectangle. Below these buttons is a search bar and a 'Complete View' button. A table lists submittal items with columns for 'Submittal Number', 'Review Cycle', 'CSI Code', and 'CSI Name'. The first row shows '01010-001', '001', '01010', and 'SUMMARY OF WORK'. To the right of the table is a section titled 'PROJECT INFORMATION' with a dropdown arrow.

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**.

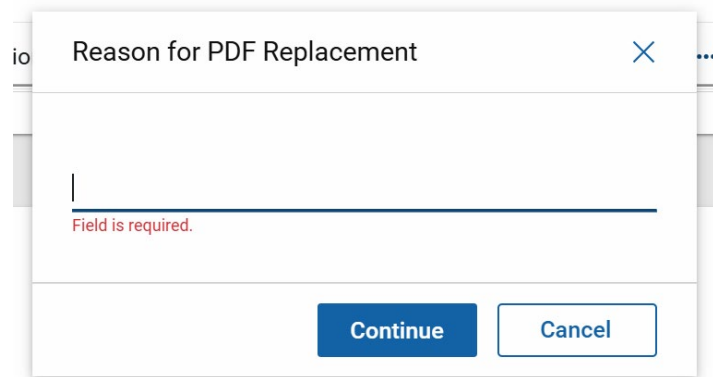
The screenshot shows the action bar for a submittal. It contains three buttons: 'Request New Review Cycle', 'Replace PDF' (highlighted with a red rectangle), and 'View'. Below the buttons is a 'Complete View' button and a 'PROJECT INFORMATION' section with a dropdown arrow.

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**.

The screenshot shows a button labeled 'Submit Replacement PDF' in a light blue box. Below the button is a section titled 'Official Reviewer Replace PDF Task View'.

**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**.

A modal dialog box titled "Reason for PDF Replacement" with a close button (X) in the top right corner. It contains a text input field with a red error message "Field is required." below it. At the bottom, there are two buttons: "Continue" (blue) and "Cancel" (white with blue border).

Reason for PDF Replacement

Field is required.

Continue Cancel

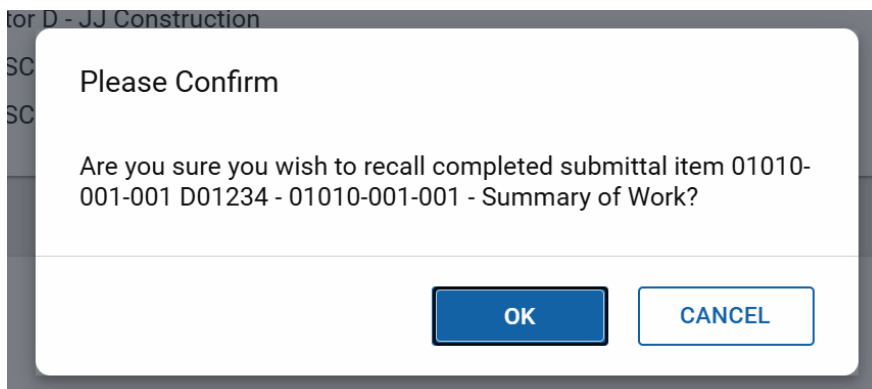
## Recall Submittal

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** at the top of the record
3. Click **OK**, to confirm.

A horizontal bar containing three buttons: "Replace PDF" (blue), "Recall" (white with blue border, highlighted with a red rectangle), and "View" (blue) with a dropdown arrow.

Replace PDF Recall View

A modal dialog box titled "Please Confirm". The text inside asks: "Are you sure you wish to recall completed submittal item 01010-001-001 D01234 - 01010-001-001 - Summary of Work?". At the bottom, there are two buttons: "OK" (blue) and "CANCEL" (white with blue border).

Please Confirm

Are you sure you wish to recall completed submittal item 01010-001-001 D01234 - 01010-001-001 - Summary of Work?

OK CANCEL