General Contractor Utility (GCU) e-Submittal

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SCA
NYC School Construction Authority

eSubmittal

eSubmittal was implemented in an effort to streamline the submittal processes for our General Contractors (GC), Project Officers (PO), and Architects / Engineers of Record (AEOR)

What are the benefits?

- Documents are digitally uploaded.
- Submittal Packages are created electronically by the GC.
- Review Cycle is generated by the GC and forwarded to PO & AEOR electronically for review and comments.
- Real Time results and notifications.

eSubmittal Step by Step GC (a.)

1. Log on to Citrix (external users)

2. Click on GC Utility Icon in the SCA Application Portal

3. The "GCU Dashboard – To Do List" is displayed

4. From the Dashboard Select the eSubmittal Tab

5. Click on the project icon to display list of projects

6. Select your project

eSubmittal Step by Step GC (b.)

6. You can also select your project using Link below

   • *Initial Project Log Waiting for Approval*

7. Create the submittal log and send it to PO for review

8. The PO sends it to the AEOR for review

9. Upon review by AEOR the log is created in PCM and numbers are assigned to each submittal.

10. The GC can now begin the Submittal process.

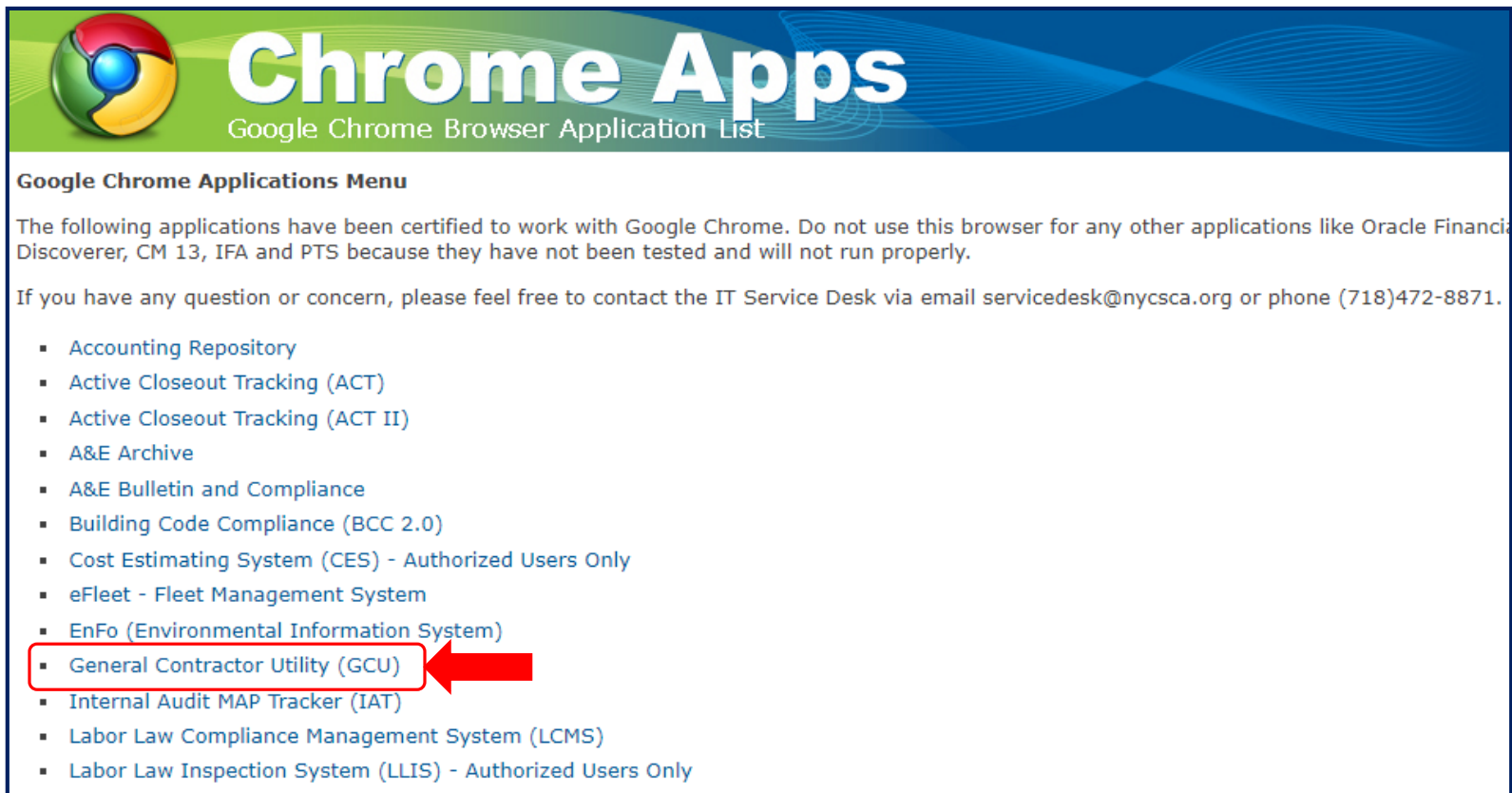# General Contractor Utility
(GCU) Login

Login Steps: (External Users)

    1. Log on to Citrix

    2. Click on the GC Utility icon
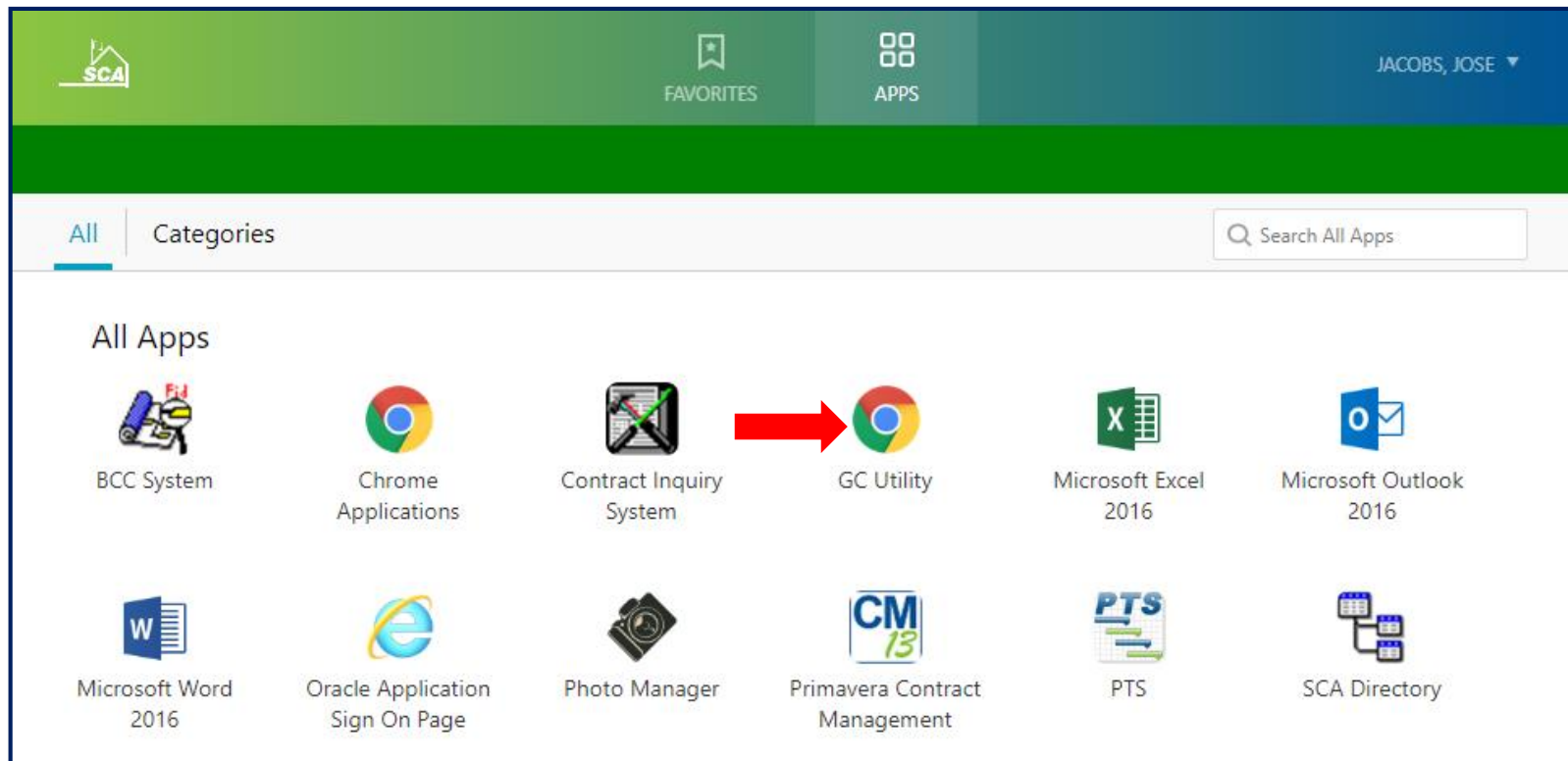
General Contractor Utility (GCU) Login

Login Steps: (Internal Users)

1. Open your Chrome Browser

2. Click on the GC Utility icon

eSubmittal Dashboard – To Do List

- Click on the eSubmittal Tab to display the eSubmittal Dashboard,

eSubmittal Dashboard – To Do List

- Click on the link 'Initial Project Log waiting for approval' to view and select your project.
- If the project is not listed, click on the projects icon to view and select the project

* Click on the Project name to open the project

eSubmittal – Project Detail Window

Project header:

Progress Bar:

Master & Submittal Log

eSubmittal Step by Step GC (1.)
Create Submittal Log

1. Download SCA Master Submittal log by clicking of the excel icon

2. Open the downloaded MasterLogs file

3. Save file on to your computer.

4. Expand columns to fit text

5. Do not remove any columns

eSubmittal Step by Step GC (2.)
Create Submittal Log

6. Remove rows that are not applicable to your project

7. Remove rows that have blank Submittal Titles

8. Do not change data from the following columns

    (Project Name, Division, Package Name and Package

    Name Abbreviation)

9. Change Only Data in the following columns*

    (Submittal Name, Submittal Name Abbreviation)

eSubmittal Step by Step GC
Create Submittal Log

If submittal pkg is not in the master log provided, you can add rows to the log by filling the following columns.

(Project Name, Division, Package Name, and Package Name Abbreviation, Submittal Name, Submittal Name   Abbreviation)

Upon completion of the changes Save File As <u>Text (Tab delimited) (*.txt)</u>
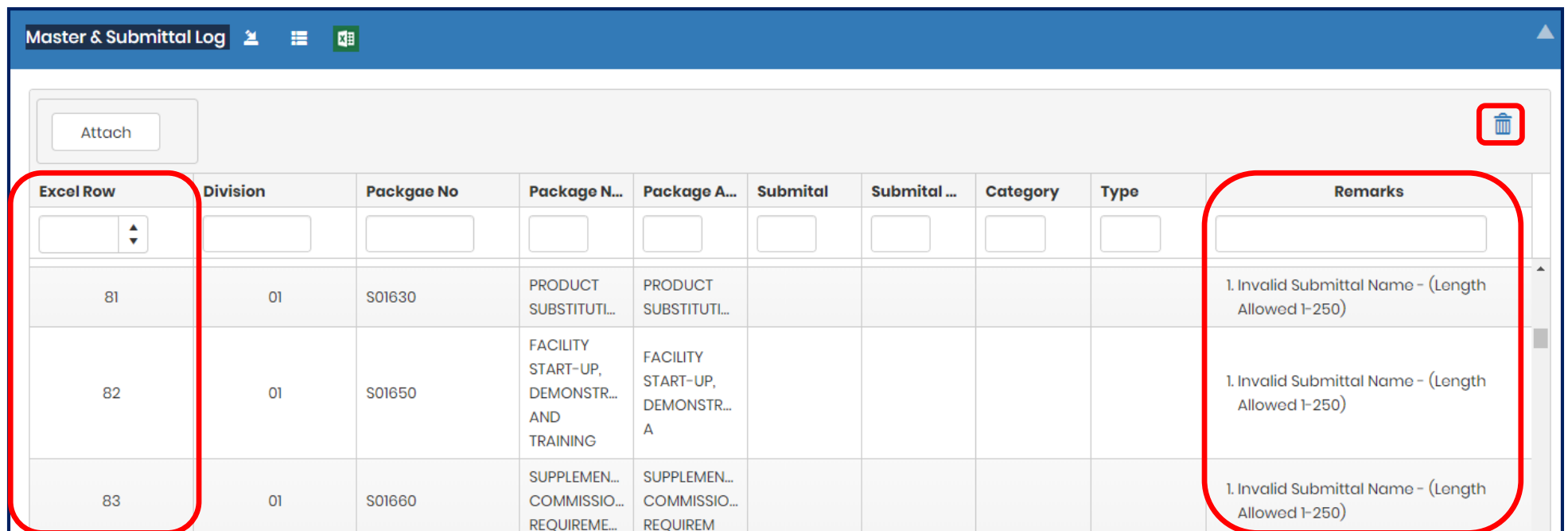
You can now **import** the updated text file into the e-Submittal module by clicking on the Attach button. [Attach]

eSubmittal Step by Step GC
Create Submittal Log

If there are errors in the file uploaded they will show in the screen below. See Remarks Column for description of error. Use row number below to make corrections on the Master log. Once all corrections are made click on the Delete Icon 🗑 to clear screen and start over the upload

Excel Row	Division	Packgae No	Package N...	Package A...	Submital	Submital ...	Category	Type	Remarks
81	01	S01630	PRODUCT SUBSTITUTI...	PRODUCT SUBSTITUTI...					1. Invalid Submittal Name – (Length Allowed 1-250)
82	01	S01650	FACILITY START-UP, DEMONSTR... AND TRAINING	FACILITY START-UP, DEMONSTR... A					1. Invalid Submittal Name – (Length Allowed 1-250)
83	01	S01660	SUPPLEMEN... COMMISSIO... REQUIREME...	SUPPLEMEN... COMMISSIO... REQUIREM					1. Invalid Submittal Name – (Length Allowed 1-250)

eSubmittal Step by Step GC
Submittal Process

1. Once the file is uploaded with no errors the log can be submitted for review to the Project Officer.
2. Project Officers reviews the log
   - Can return the log to the GC for corrections
   - or they forward the log to the architect for review
3. The AOR
   - Can return the log to the GC for corrections
   - or they Concur
4. Once concurred the log is created in PCM and submittals numbers are issued.
5. This will enable the GC to start the submittal process.

eSubmittal Step by Step GC
Submittal Process

To Add New Review Cycle Click on the pencil Icon

Add Category and Type from the dropdown menu.

Click on the

Update button

to save.

eSubmittal Step by Step GC
Submittal Process

1. From the Dashboard To Do List click on the Project Icon to view the project
2. Click on the project to view the submittal details window.
3. The GC can add a new submittal or add a new review cycle.
4. Click on the pencil (edit) icon to add Category and Type from the dropdown menu. Click on the Update button to save.
5. To add a new review cycle click on the Plus icon at the end of the row.
6. The GC can also delete a Submittal if a review cycle hasn't been created.*

eSubmittal Step by Step GC
Submittal Process – New Review Cycle

- To add a new review cycle click on the Plus icon at the end of the row.

- Select Yes to the Prompt

eSubmittal Step by Step GC
Submittal Process – New Review Cycle

Add New Review Cycle (continue)

- GC will select a submittal type from the drop down menu – same selection as indicated in the transmittal

- Submittal file should include the transmittal with information as required by contract documents. (PDF Format ONLY)

- Click Submit for Review button.

- Optional Comments Box – Click OK

- Close review cycle window.

Note

- When submitting a sample, follow all the above steps including the transmittal and a picture of the sample (optional)
- Upon receipt of physical sample the submittal coordinator will sent it to reviewer

eSubmittal Review Cycle

eSubmittal Process

Add New Submittal

- GC will click on the new Submittal button.
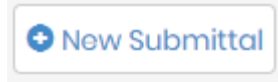
Key Fields:

1. **Division** — Select Division number from Dropdown menu
2. **Package No** — Type in first few number and select from menu
3. **Package Title** — If its an existing package the title and abbreviation will be auto populated.
4. **Package Title Abbrev** — Auto populated from Master Log or type in abbreviated package title
5. **Submittal Title** — Manually enter submittal title
6. **Submittal Title Abbrev** — Enter Abbreviation for submittal title (max 35 characters)

Note

- If a new package was added Submittal Coordinator will need to approve the package before the GC start submitting.
- If added to an existing package, a number will need to be issued before the GC can start the submittal.

eSubmittal Review Cycle
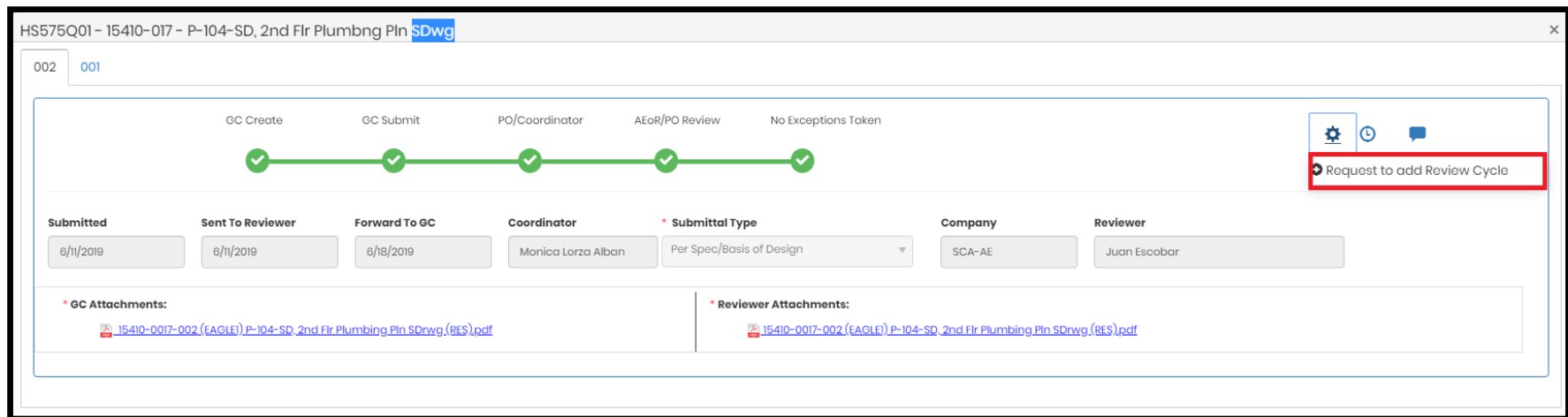
Add New Submittal window

Add New Submittal

1. *** Division:** 5 Structural Steel

2. *** Package No:** 05120

3. *** Package Title:** STRUCTURAL STEEL

4. *** Package Title Abbrev:** STRUCTURAL STEEL   Max 35 Characters

5. *** Submittal Title:** Rebar Shop Drawing for East Side of the Building

6. *** Submittal Title Abbrev:** Rebar Shop Draw for ESide of the Bldg ✕   Max 35 Characters

7. Save   Close

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eSubmittal Step by Step GC

Submittal Proccess

Request a New Review Cycle for an approved submittal

- GC would request to add a new review cycle to a submittal that has been Approved with the status NET or MCN
- Click on the ⚙ icon and select Request to Add Review Cycle
- In the comments box enter the reason why a review cycle needs to be added to an approved Submittal
- Upon approval of the request from Submittal Coordinator, GC will be able to add a new review cycle

Questions?

Questions or Technical Support

- SCA Service Desk

  - Phone: 718.472.8871

  - email: HelpDesk@nycsca.org

- **Additional Training**

  - Jose Jacobs
  - Jamal Wright   scaittraining@nycsca.org

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