



Submittal Packages

A submittal package is a group of one or more submittal items.

Creating a New Submittal Package

- 1. Navigate to the Submittal Package log within a project.
- 2. Click the **New Package** button on top of the Submittal Package log.

Submittal Items share	d with me					New Item	New Package Print
Items Packages							
Show Latest Revisions Only	(
Item# +	Subject ‡	Revision ©	Revision Date 🗘	Reviewer Action ©	Closed ©	Created On ‡	Shared
					•		
Specification Section: Elect	rical						
Electrical-01.0	Wiring Diagram	0				4/25/19 4:38 PM	L 1 Edit
Electrical-01.1	Wiring Diagram	1				4/25/19 5:15 PM	1 Edit
Electrical-02.0	Electrical Project Data	0				4/25/19 4:38 PM	L 1 Edit
Electrical-03.0	Raceways	0				4/25/19 4:38 PM	1 Edit

3. Enter a title for the submittal package in the **Subject** field. This is a required field and will need to be populated to save the record.

Subject	* Required
Type the Subject	

4. Double-click inside the **Specification Section** field and select the specification to apply to the submittal package. This is a required field and will need to be populated to save the record.

Specification Section 🕲	* Required

Note: Refer to the QRGs for Specifications and Specification Packages for more information on how to set up the project specifications.

5. Enter a **Number** for the submittal package. This is a required field and will need to be populated to save the record.

Number	* Required
Type the Number	

6. The **Revision No** field will automatically populate with 0 for the first revision of the submittal package. If new revisions of the submittal package are created, the Revision No field will update with the next sequential number. There is no need to update this field unless the submittal package revision number is different from the one entered.

Revision			
0			

7. Enter the **Description** for the submittal package document.

scription	
Type the Description	
	6

8. To add Submittals to the package, click the **Add Existing** button if the Submittal records already exist in ProjectTeam.

Item # Subject Revision Date Attachments Reviewer Action Action Notes	Closed

Click the **checkbox** beside the title of each Submittal to add to the package and click the **Add** button.

	Add Existing Submittal Items						×
Searc	:h		Q				
	Item #	Subject	Revision Date	Attachments	Reviewer Action	Action Notes	Closed
	Electrical-01.1	Wiring Diagram		% 0			
	Electrical-03.0	Raceways		% 0			
	Electrical-02.0	Electrical Project Data		% 0			
	Electrical-01.0	Wiring Diagram		% 0			
Canc	el						Add

If a submittal does not exist in ProjectTeam, click the Create New button.

Submittal Items					🖋 🛛 Add Existing	Create New
Item #	Subject	Revision Date	Attachments	Reviewer Action	Action Notes	Closed

Fill in the submittal fields and click the **Save** button.

Create New	>
ubject	* Required 🔺
Type the Subject	
livision	
	· ·
pecification #	* Required
Type the Specification #	
levision #	
0	
levision Date	
liscipline	
	•
esign Business	
-	
esign Contact	
-	

9. The Submittal Package form will show all of the Submittal records added to the package.

Submit	al Items					بر Add Existing ا	Create New
	item #	Subject	Revision Date	Attachments	Reviewer Action	Action Notes	Closed
•	Electrical-01.1	Wiring Diagram		% 0	•	Type the Action Notes	
-	Electrical-02.0	Electrical Project Data		% 0	•	Type the Action Notes	
-	Electrical-01.0	Wiring Diagram		⊗0	•	Type the Action Notes	

10. When you are ready to save the Submittal Package, click the **Save & Share** button. This will allow you to save the document and send it to other members of your project.



Editing a Submittal Package

Cancel

1. Navigate to the Submittal Package in the Submittal Package log and click the **Submittal Package title** to open the document.

Save & New

Specification	Packages shared with me			New Print ***
	Subject 0	Created On ~	Shared	
	Electronic Packages	4/25/19 4:13 PM	L 1	Edit

2. Click the **Edit** button in the Details section.

Specification Packages Specification Packages Created By Susan Mills (ProjectTeam, Inc.) on 4/25/19 at 4:13 PM							Print -
SHARED WITH (1) View All					Share	ACTION ITEMS	New
٩						Show complete/obsolete items	
DETAILS					Edit		
Subject Electronic Packages						Comments Activity	
General Notes Specifications						Comment	
Subject	Spec #	Rev #	Rev Date	Discipline			
Emission Models	02000	0		Electrical			Post
Sensor and Sensor Interface	01000	1		Electrical		No comments added to this document yet. Be the first to comment.	
WORKFLOWS					Start New	REFERENCE LINKS	New •
ATTACHMENTS					New *		

3. Update all fields you wish to change.

-	ETAILS				
Subject					
Electr	onic Packages				
General	Notes				
Туре	the General Notes				
					1
Specific	ations				x* Add Existing Create New
	Subject	Spec #	Rev #	Rev Date	Discipline
•	Emission Models	02000	0		Electrical
	Sensor and Sensor Interface	01000	1		Electrical

4. When all changes are complete, click the **Save** button.



Add a Reviewer Action

1. Open the Submittal log and click **the Submittal Packages** tab. Click the **Edit b**utton for the package to be reviewed.

Submit	tal Package	es shared with me							New Item New Par	ickage
Items	Packages									
	ltem#≎		Subject 🗘			Revision Date ¢		Created On 👻	Shared	
	Electrical-01	.0	Electrical	Package		4/30/19		4/30/19 5:06 PM	A 1	Edit
Item #		Subject		Revision Date	Reviewer Act	ion	Action Notes		Closed	
Electrica	l-01.0	Wiring Diagram								
Electrica	I-02.0	Electrical Project Data								
Electrica	l-01.1	Wiring Diagram								

2. The Submittal Package Details page will open. Scroll to the bottom of the page to review the submittal items for the package. For each submittal item in the package, click the **Reviewer Action dropdown arrow** and select the appropriate action.

Submitt	al Items					Add Existing	Create New
	Item #	Subject	Revision Date	Attachments	Reviewer Action	Action Notes	Closed
•	Electrical-01.1	Wiring Diagram		⊗0	•	Type the Action Notes	
-	Electrical-02.0	Electrical Project Data		�0	•	Type the Action Notes	
•	Electrical-01.0	Wiring Diagram		�0	-	Type the Action Notes	

3. Enter additional information in the **Action Notes** field.

Submittal Items Add Existing Creat										
	Item #	Subject	Revision Date	Attachments	Reviewer Action	Action Notes	Closed			
-	Electrical-01.1	Wiring Diagram		∞0	Revise and Resubmit 🛛 🗶 👻	Missing page 3.				
-	Electrical-02.0	Electrical Project Data		⊗ 0	•	Type the Action Notes				
-	Electrical-01.0	Wiring Diagram		⊗0	•	Type the Action Notes				

4. Complete steps 1-3 for each submittal item in the package. Click the **Save** button in the top right corner to save the actions.

Submittal Pa	ackage							Cancel	Sa
	Revision	n Date							
	04/30	/2019							
	Descrip	tion							
	Туре	the Description							
								li,	
	Submittal Items Add Existing Create New								
		Item #	Subject	Revision Date	Attachments	Reviewer Action	Action Notes	Closed	
	•	Electrical-01.1	Wiring Diagram		% 0	Revise and Resubmit 🛛 🗙 👻	Missing page 3.		
	•	Electrical-02.0	Electrical Project Data		80	•	Type the Action Notes		
							4		
	-	Electrical-01.0	Wiring Diagram		% 0	•	Type the Action Notes		
							Â.		