



# Submittal Creation

## Agency/Higher-Ed

# Purpose

- ▶ The purpose of the Submittals BP is to provide a means for managing and tracking the various forms of submittals required for a successful construction project.

- ▶ Workflow

Created by: Contractor → Submitted to: Associate (A/E) Review → Sent to: Contractor Update, Consultant Review, or Hold Notice Notification

# Create a Submittal Record- Contractor

- ▶ In Oaks CI navigate to:
  - ▶ Logs -> Submittals
  - ▶ Click Create

The screenshot shows the Oracle Primavera Unifier (Development) interface. The left sidebar contains a navigation menu with 'Logs' highlighted. A red arrow points from the 'Logs' menu item to the 'Submittals' menu item. The main content area displays the 'Submittals' page with a '+ Create' button circled in red. Below the button is a table of submittal records.

Title	Cont
Jordan	R. W.
Mike 01	R. W.
Jordan	R. W.
CHRIS	R. W.
courtney	R. W.
Nate's Test Submittal	R. W.
Brian	R. W.
Collin	R. W.
Cover Page Submittal	
JTC	R. W.
Joe	R. W.
Lunch sounds good right now	R. W.
sub 1	R. W.
#1 concrete	R. W.
AHU	R. W.
Submittal #1	R. W.
Submittal 1	R. W.
Submittal 1	R. W.
submittal 1	R. W.
Armor Stone	R. W.
Paint Color for walls	R. W.
0300	R. W.
Carpet	R. W.
lo	R. W.
233113 Metal Ducts	R. W.
Ahu 10	R. W.
raadsfa	R. W.
hungry	
230000 HVAC equip	
submittal test	R. W.
Submittal no 1	R. W.
Light Fixtures	R. W.
Gear	R. W.
title	R. W.
Submittal Today	R. W.
Cooling Tower	
03350 concrete admittures	R. W.
03 Concrete Dog Bone Stepping Stone	R. W.
Gear	R. W.
Fixtures	R. W.
03300 Submittal Test	R. W.
23000 010 AHU	R. W.
Test Submittal	R. W.
230075 SOCC Cooling Tower	R. W.
3300.13 Concrete mix design	R. W.

# Create a Submittal Record

- ▶ Complete the General tab

Submittals - Submittal #1 - Project No. OCI-090004 - Mozilla Firefox

https://ohio-dev-unifier.oracleindustry.com/bp/process/new?copy=1&attach=false&fromModel=us1&fromSource=document&fromM

File Edit View Actions Help

Workflow Actions -Select- Send Save Spelling.. Discussion Close Window

**General** Submittals

Organization: Department of Administrative Services Record Number:

Project Number: OCI-090004 Creator: [Katie Tuttle](#)

Project Name: OAKS CI Training 4 Creation Date:

Project Location: 4200 Surface Road Status:

Title: Submittal #1 \* Due Date:

Contract Name: Wednesday's Training Select... Contractor Name:

Contract No.: oci-143582987 Contractor Name:

Drawing No.:

Date Answer Requested:  Specification Section:

Notes

Notes:

Action Details

Submittals List

[Linked Records \(0\)](#) [General Comments](#) [Linked Mail \(0\)](#)

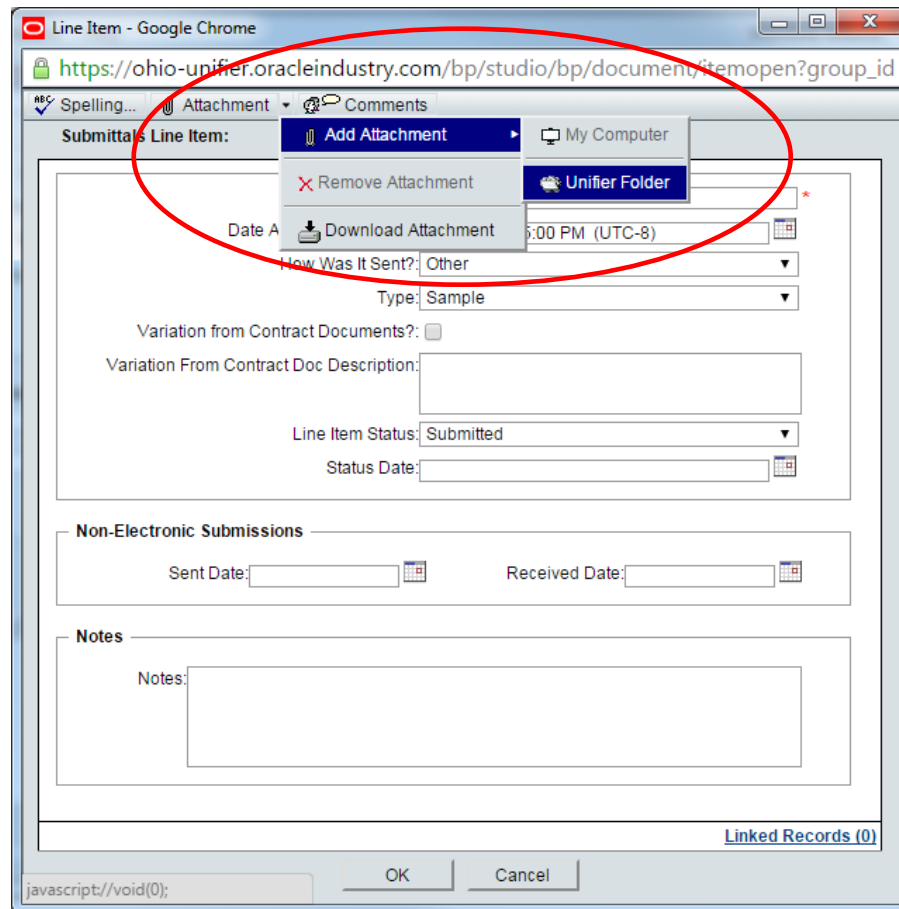
# Add Line Item

- ▶ In the Submittals List Tab, Click Add

The screenshot shows a web browser window titled "Submittals - Submittal #1 - Project No. OCI-090004 - Mozilla Firefox". The address bar shows the URL: <https://ohio-dev-unifier.oracleindustry.com/bp/process/new?copy=1&attach=false&fromModel=us1&fromSource=document&fromM>. The browser has a menu bar with "File", "Edit", "View", "Actions", and "Help". Below the menu bar is a toolbar with "Workflow Actions" (set to "-Select-"), "Send", "Save", "Spelling..", "Discussion", and "Close Window". The main content area has a tabbed interface with three tabs: "General", "Action Details", and "Submittals List". The "Submittals List" tab is selected and circled in red. Below the tabs, there is a section for "Attachments" with a table header: "Name", "Line Item Status", "Status Date", "Variation?", and "Type". The table is currently empty, showing "0 Item(s)". At the bottom of the interface, there is a toolbar with buttons for "Add", "Copy", "Import", "Remove", "Comments", and "Download". The "Add" button is circled in red, and a red arrow points to it from the right. At the very bottom, there are three links: "Linked Records (0)", "General Comments", and "Linked Mail (0)".

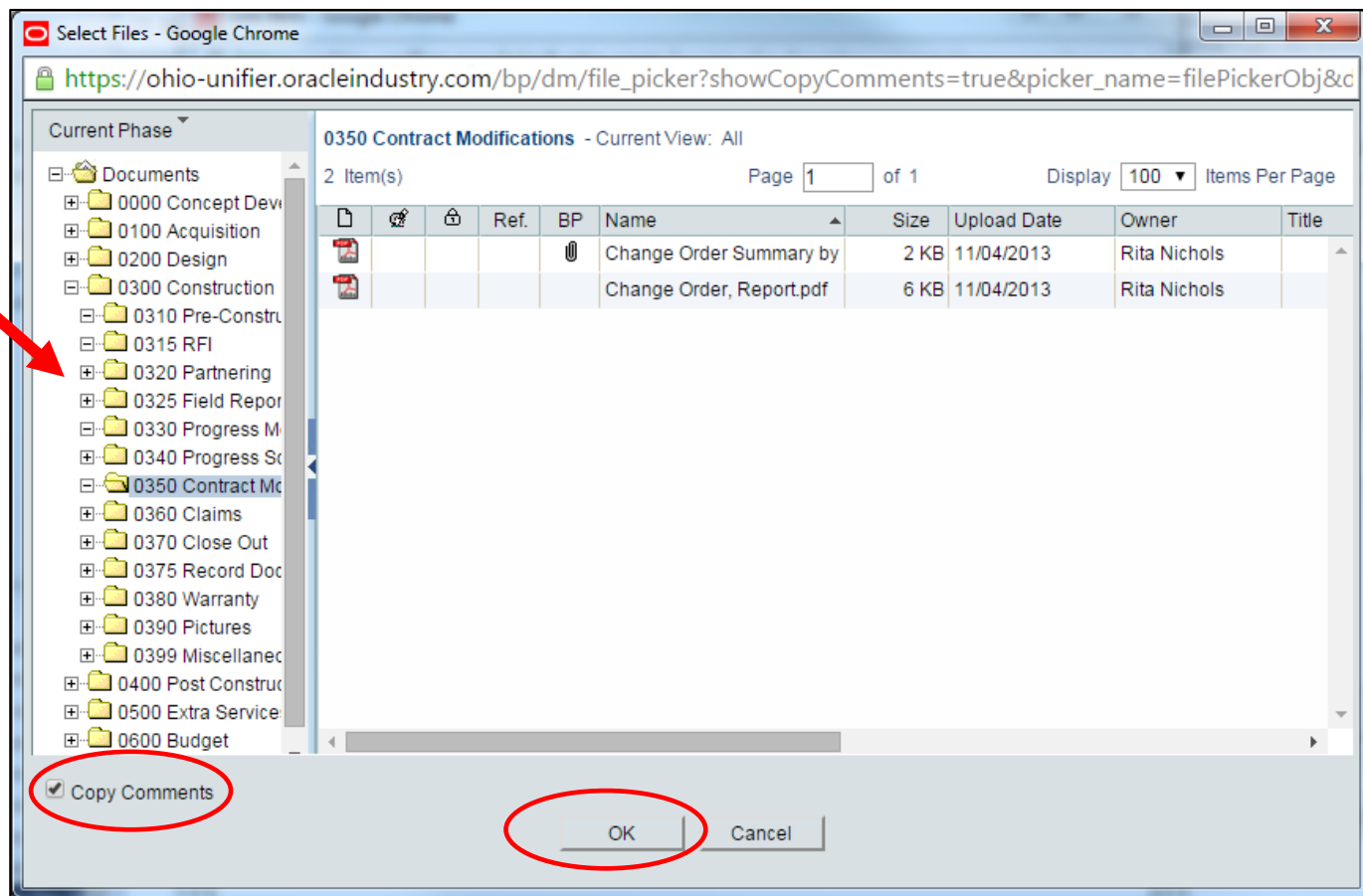
# Submitting Samples Electronically

- ▶ Ensure your files have been uploaded into Document Manager
- ▶ Click Attachment, Add Attachment, choose Unifier Folder



# Attaching Files

- ▶ Navigate to the folder containing your document(s)
- ▶ Check the Copy Comments box, if appropriate
- ▶ Click OK



# Submitting Samples Electronically

- ▶ You'll see your attached document at the top of your Line Item window
- ▶ Click "Save & Add New" to add additional documents
- ▶ Click "Save & Close" to return to the submittal form

Line Item - Mozilla Firefox

https://ohio-dev-unifier.oracleindustry.com/bp/studio/bp/document/itemopen?group\_id=1

Spelling... Attachment Comments

**Submittals Line Item:**

Name: **password expiring.docx**

Date Answer Requested: [Calendar Icon]

How Was It Sent?: -Select-

Type: -Select-

Variation from Contract Documents?:

Description of Variation: [Text Area]

Line Item Status: Submitted

Status Date: [Calendar Icon]

**Non-Electronic Submissions**

Sent Date: [Calendar Icon] Received Date: [Calendar Icon]

**Notes**

Notes: [Text Area]

[Linked Records \(0\)](#)

Save & Close Save & Add New Cancel



# Submittal Record

- ▶ You'll see the lines on your submittal record in the Submittals List tab

The screenshot shows a web browser window titled "Submittals - Submittal #1 - Project No. OCI-090004 - Mozilla Firefox". The URL is <https://ohio-dev-unifier.oradeindustry.com/bp/process/new?copy=1&attach=false&fromModel=us1&fromSource=document&fromModelId=390&wft>. The application interface includes a menu bar (File, Edit, View, Actions, Help) and a toolbar with options like Send, Save, Spelling, Discussion, and Close Window. The main content area is divided into tabs: General, Action Details, and Submittals List. The Submittals List tab is active, showing an "Attachment Index : (1)" and "Current View: All". Below this, there are controls for "New", "Rename", "Move", "Delete", "Page 1 of 1", and "Display 100 Item(s)". A table with the following columns is displayed: Name, Line Item Status, Status Date, Variation?, and Type. The table contains one row: "password expiring.docx", "Submitted", and "No". A red box highlights this row, and a red arrow points to it. At the bottom of the interface, there are buttons for "Add", "Copy", "Import", "Remove", "Comments", "Download", and "Find".

Name	Line Item Status	Status Date	Variation?	Type
password expiring.docx	Submitted		No	

# Routing for Approval

- ▶ Choose Workflow Action: Submit
- ▶ The (To) field is auto populated with Associate (A/E)
- ▶ Click Send

Submittals - Submittal #1 - Project No. OCI-090004 - Mozilla Firefox

https://ohio-dev-unifier.oracleindustry.com/bp/process/new?copy=1&attach=false&fromModel=us1&fromSource=document&fromModelId=390&wft

File Edit View Actions Help

Workflow Actions: Submit (dropdown) | Send | Save | Spelling.. | Discussion | Close Window

General: Submit (dropdown) | Submit via Transit

Organization: Department of Administrative Services | Record Number: [ ]

Project Number: OCI-090004 | Creator: Katie Tuttle

Project Name: OAKS CI Training 4 | Creation Date: [ ]

Project Location: 4200 Surface Road | Status: [ ]

Action Details

Submit

To...: Archana Atrey, Barbara Taylor, Bill Schwertfager, [ ]

Cc...: Archana Atrey, Barbara Taylor, Bill Schwertfager, [ ]

Send For: Associate Review

Task Due: 07/12/2017

Task Notes: [ ]

Workflow Progress

Submittals List

Attachment Index: (1) | Current View: All | Display Attachments with Comments by: All

New Rename Move Delete 1 Item(s) | Page 1 of 1 | Display 100 Item

Name	Line Item Status	Status Date	Variation?	Type
password expiring docx	Submitted		No	

Add | Copy | Import | Remove | Comments | Download | Find

Linked Records (0) | General Comments | Linked Mail (0)

# Questions?

Please contact OAKS CI Support Desk:

[oaksci@ofcc.ohio.gov](mailto:oaksci@ofcc.ohio.gov)

614.644.2211