



Submittals Creation

K-12 Cloud

Purpose & Procedure

- ▶ 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.
- ▶ The Submittals BP is used by contractors for the submission, review and approval of submittals as stipulated in the contract documents

- ▶ Workflow

Created by: **Contractor** → Sent to: **A/E Review** → Sent to: **Contractor Update, Consultant Review, or Hold Notice Notification**

Roles & Responsibilities

- ▶ Contractor

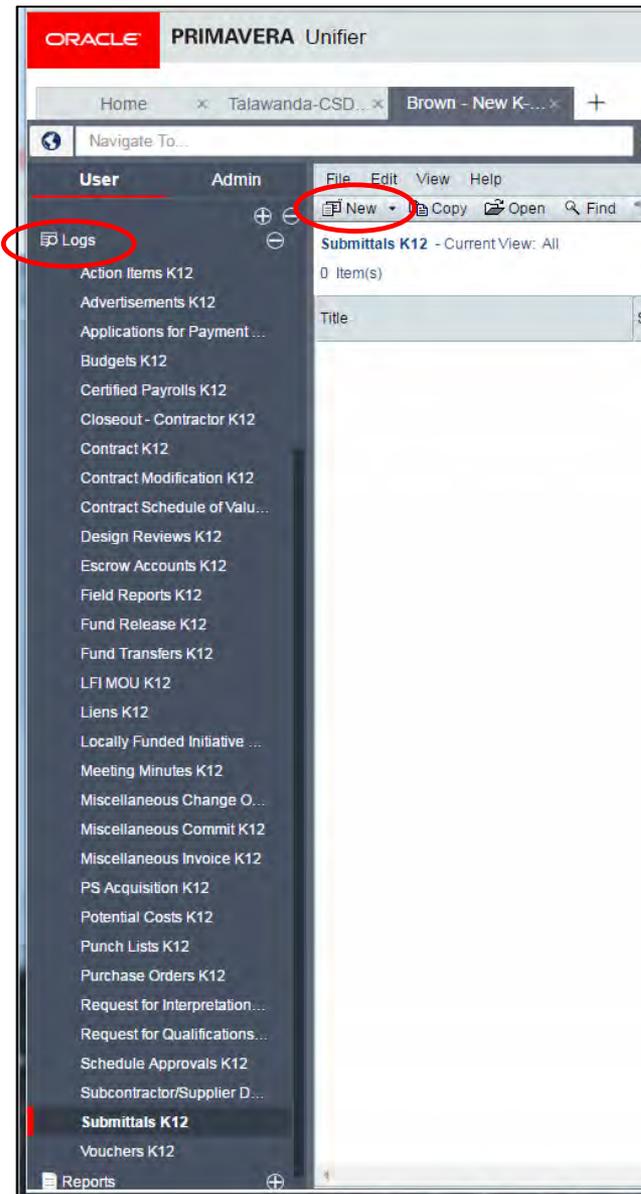
- ▶ Submits documents, samples, etc. to A/E (A/E) for conformance with contract documents

- ▶ A/E

- ▶ Reviews the contractor submittals for conformance with contract requirements
- ▶ Advises contractors of submittals held for coordination of colors, patterns, etc.
- ▶ Returns incomplete or unacceptable submittals to the contractor
- ▶ Coordinates review of submittals with their consultants
- ▶ Advises Lead Contractor (non-CM projects) of submittal review status for scheduling purposes

Create a Submittal Record- Contractor

- ▶ In Oaks CI navigate to:
 - ▶ Logs -> Submittals K12
 - ▶ Click New



Create a Submittal Record

- ▶ Complete the Upper Form (General tab)

Create New Submittals K12 - Project No. SFC-080001.01 - Google Chrome

https://ohio-train-unifier.oracleindustry.com/bp/process/new?wftemplate_id=3020&module_name=us1k&csvimport=fa:

File Edit View Actions Help Workflow Actions -Select-

Send Save Spelling.. Discussion Close Window

General Submittals K12

Project Number: SFC-080001.01 Record Number:

Project Name: Oak Hills Local Building Project Creator: [Katie Tuttle](#)

Organization Name: Creation Date:

Facility Name: Status:

Title: Test Submittal * Due Date:

Contract Name: Test Contract 3 Select... Vendor Name: Joe General Contractor

Contract No.: 123456 Drawing No.:

Specification Section: 778B

Notes

Notes: Please review and accept this submittal

Document Publishing

Documents attached from the desktop will be published in the 'Publish Path' directory shown below.

FilePath: Submittals

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 the Oracle Primavera P6 interface for creating a new submittal. The browser window title is "Create New Submittals K12 - Project No. SFC-080001.01 - Google Chrome". The URL is https://ohio-train-unifier.oracleindustry.com/bp/process/new?wftemplate_id=3020&module_name=us1k&csvimport=fal. The 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 titled "Submittals K12" and has three tabs: "General", "Action Details", and "Submittals List". The "Submittals List" tab is selected and circled in red. Below the tabs, there are controls for "Attachment Index : (0)", "Current View: All", and "Display Attachments with Comments by: All". A toolbar shows "New", "Rename", "Move", and "Delete" options, along with "Page 1 of 1" and "Display 100 Items Per Page". A table header is visible with columns: "Name", "Line Item Status", "Status Date", "Variation?", and "Type". At the bottom, there is a toolbar with "Add", "Copy", "Import", "Remove", "Comments", "Download", "Find", and "Reference" buttons. The "Add" button is circled in red, and a red arrow points to it. At the very bottom, there are links for "Linked Records (0)", "General Comments", and "Linked Mail (0)".

Submitting Samples by Mail

- ▶ If mailing the sample, complete the fields on this form, including the Non-Electronic Submissions section
- ▶ Click OK

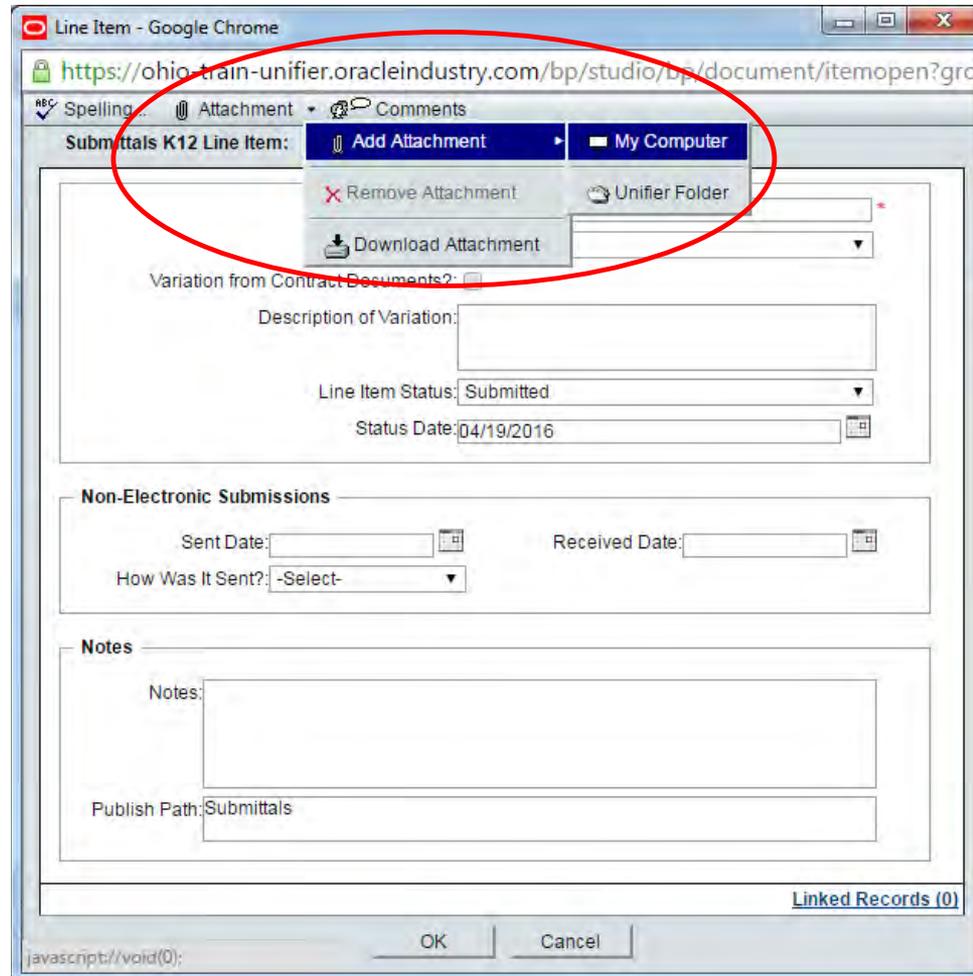
The screenshot shows a web browser window with the title 'Line Item - Google Chrome'. The address bar displays the URL: <https://ohio-train-unifier.oracleindustry.com/bp/studio/bp/document/itemopen?grc>. The page content is titled 'Submittals K12 Line Item:' and contains the following fields:

- Name: Floor Sample
- Type: Sample
- Variation from Contract Documents?:
- Description of Variation: [Empty text area]
- Line Item Status: Submitted
- Status Date: 04/19/2016
- Non-Electronic Submissions** (highlighted with a red box):
 - Sent Date: 04/19/2016
 - Received Date: [Empty date field]
 - How Was It Sent?: UPS
- Notes: [Empty text area]
- Publish Path: Submittals

At the bottom right, there is a link for 'Linked Records (0)'. At the bottom center, there are 'OK' and 'Cancel' buttons.

Submitting Samples Electronically

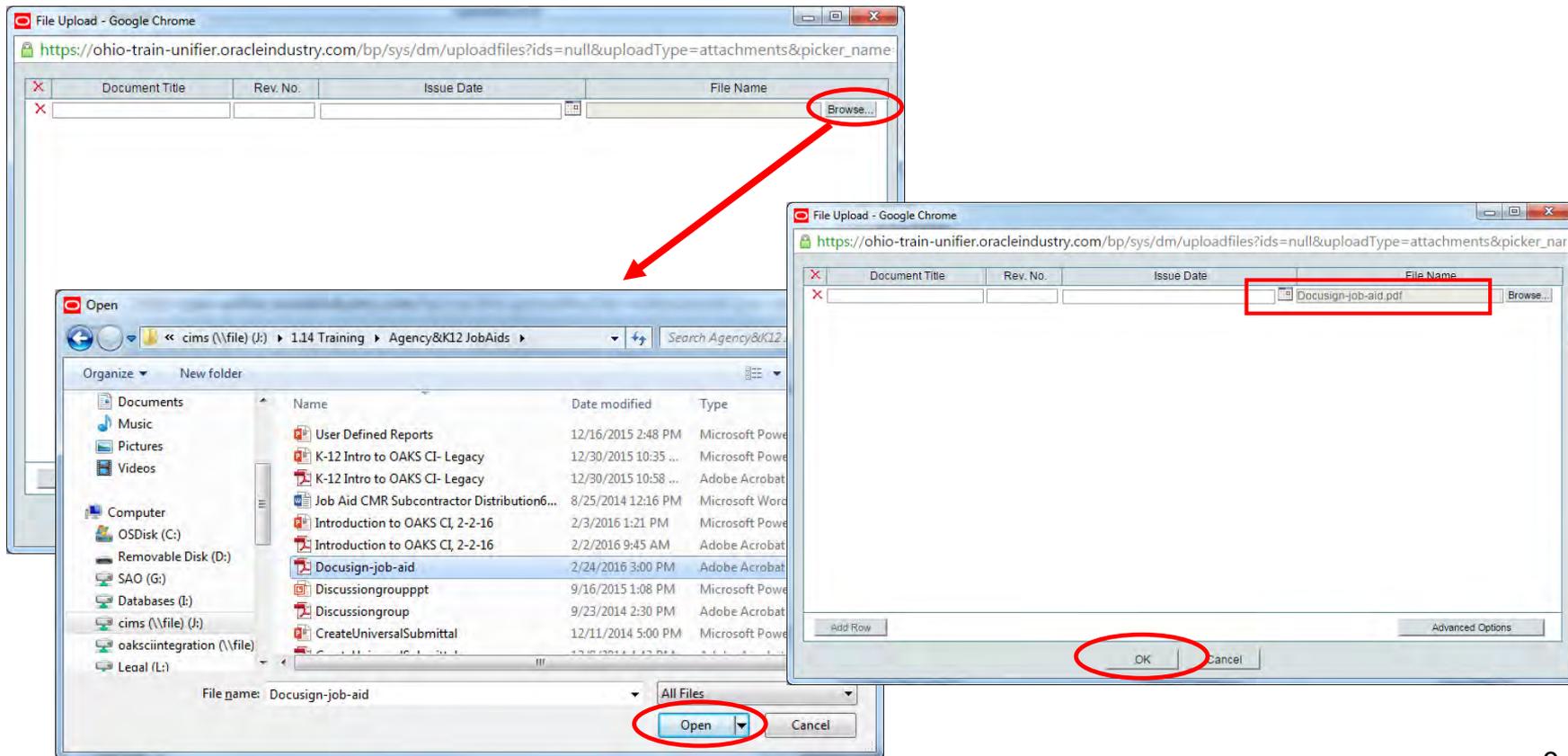
- ▶ Complete the necessary fields on the form
- ▶ Click Attachment, Add Attachment, choose My Computer



The screenshot shows a web browser window titled "Line Item - Google Chrome" with the URL <https://ohio-train-unifier.oracleindustry.com/bp/studio/bp/document/itemopen?grc>. The page displays a form for "Submittals K12 Line Item:". The "Attachment" menu is open, showing options: "Add Attachment" (selected), "Remove Attachment", "Download Attachment", and "Unifier Folder". The "My Computer" option is highlighted. Below the attachment menu, there are fields for "Variation from Contract Documents?", "Description of Variation:", "Line Item Status" (set to "Submitted"), and "Status Date" (set to "04/19/2016"). There is also a section for "Non-Electronic Submissions" with fields for "Sent Date:", "Received Date:", and "How Was It Sent?" (set to "-Select-"). A "Notes" section is present with a text area and a "Publish Path" field set to "Submittals". At the bottom, there are "OK" and "Cancel" buttons. A red circle highlights the "Attachment" menu and its options.

Attaching Files

- ▶ In the file upload window, click Browse
- ▶ Choose the file you wish to upload
- ▶ Click Open, file is populated in file upload window
- ▶ Click OK



Submitting Samples Electronically

- ▶ You'll see your attached document at the top of your Line Item window
- ▶ Click OK

The screenshot shows a web browser window titled "Line Item - Google Chrome" with the URL <https://ohio-train-unifier.oracleindustry.com/bp/studio/bp/document/itemopen?grou>. The page content is titled "Submittals K12 Line Item:". The main form area contains the following fields:

- Name:** DocuSign-job-aid.pdf (This field is circled in red, and a red arrow points to it from the right.)
- Type:** Sample (dropdown menu)
- Variation from Contract Documents?:**
- Description of Variation:** (text input field)
- Line Item Status:** Submitted (dropdown menu)
- Status Date:** 04/19/2016 (calendar icon)

Below the main form is a section titled "Non-Electronic Submissions" with the following fields:

- Sent Date:** (calendar icon)
- Received Date:** (calendar icon)
- How Was It Sent?:** -Select- (dropdown menu)

Below that is a "Notes" section with a "Notes:" label and a text input field. At the bottom of the form is a "Publish Path:" label with a text input field containing "Submittals".

At the bottom right of the form is a link: [Linked Records \(0\)](#). At the bottom center are two buttons: "OK" and "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 "Create New Submittals K12 - Project No. SFC-080001.01 - Google Chrome". The URL is https://ohio-train-unifier.oracleindustry.com/bp/process/new?wftemplate_id=3020&module_name=us1k&csvimport=. The browser has a menu bar (File, Edit, View, Actions, Help) and a toolbar with icons for Send, Save, Spelling, Discussion, and Close Window. The main content area is titled "Submittals K12" and has three tabs: "General", "Action Details", and "Submittals List". The "Submittals List" tab is selected. Below the tabs, there is an "Attachment Index : (1)" and "Current View: All". The "Display Attachments with Comments by:" dropdown is set to "All". The "Page 1 of 1" and "Display 100 Items Per Page" are also visible. The "Attachments" section shows a table with one row highlighted in red. A red arrow points to the table row.

Name	Line Item Status	Status Date	Variation?	Type
DocuSign-job-aid.pdf	Submitted	04/19/2016	No	

Routing for Approval

- ▶ If Submittals are attached to the BP record Select Workflow Action: Submit
- ▶ If Submittals are submitted separately select Workflow Action: Submit via Transit
- ▶ The (To) field is auto populated with A/E (A/E)
- ▶ Click Send

The screenshot shows the 'Create New Submittals K12' form. The 'Send' button is circled in red. The 'Workflow Actions' dropdown menu is open, showing 'Submit', 'Submit via Transit', and 'Submit'. A red arrow points to the 'Submit' option. The 'Submit' action details are also highlighted with a red box, showing the 'To' field populated with 'Barbara Taylor, Katie Tuttle, Kaylie Ruf, Moeniq' and the 'Send For' field set to 'AE Review'.

Project Number: SFC-080001.01
Project Name: Oak Hills Local Building Project
Organization Name:
Facility Name:
Title: Test Submittal

Record Number:
Creator: Katie Tuttle
Creation Date:
Status:
Due Date:

Submit
To... Barbara Taylor, Katie Tuttle, Kaylie Ruf, Moeniq Task Due: 05/03/2016
Cc...
Send For: AE Review

Name	Line Item Status	Status Date	Variation?	Type
DocuSign-job-aid.pdf	Submitted	04/19/2016	No	

Submittals in Transit Await

- ▶ Submittals not sent to the A/E electronically may take one or more days in transit. This step allows the record to account for submittals in transit and delay the start of the A/E's 14-day review period until receipt of the documents by the A/E.
- ▶ Upon receipt of delivery, the A/E must move the record into the A/E Review step.

Questions?

Please contact OAKS CI Support Desk:

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