



Submittals Review

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**

Contractor Submission

- ▶ If Submittals are attached to the BP record the contractor will select the Workflow Action: Submit
- ▶ If Submittals are submitted separately they will select Workflow Action: Submit via Transit
- ▶ **A/E will now receive this record as a task**

Submittals K12 - Floor Tile - Project No. SFC-080001.01 - Mozilla Firefox

https://ohio-dev-unifier.oracdeindustry.com/bp/process/new?copy=1&fromModel=us1k&fromSource=document&fromModelId=5&module_name=us1k&project_i 110%

File Edit View Actions Help

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

General: Submit (dropdown) | Submit via Transit

Project Number: SFC-080001.01 | Record Number: | Creator: Katie Tuttle

Project Name: Oak Hills Local Building Project | Creation Date: | Status: | Due Date:

Organization Name: | Facility Name: | Title: Floor Tile

Action Details

Submit: To... Archana Atrey, Barbara Taylor, Bill Schwertfager, Task Due: 07/07/2017 | Task Notes: | Workflow Progress

Cc... | Send For: AE Review

Standard

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 Items Per Page

Name	Line Item Status	Status Date	Variation?	Type
Test document 2.pdf	Submitted		No	

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

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

A/E Review

- ▶ Navigate to Tasks
- ▶ Click the Gear icon then Open to open the submittal record

The screenshot displays the Oracle Primavera Unifier (Development) interface. The top navigation bar includes the Oracle logo, the application name 'PRIMAVERA Unifier (Development)', and the user name 'Katie Tuttle'. The main content area is titled 'Tasks' and shows a list of tasks. A red box highlights the 'Open' action in the context menu for a task, and a red arrow points to the gear icon in the task header.

Tasks Table:

Origin	Business Process	Record
Oak Hills Local Building Project	Submittals K12	SUB-0007
Oak Hills Local Building Project	Design Reviews K12	DR-0001
Oak Hills Local Building Project	Locally Funded Initiative MOU	LFI-0001
Oak Hills Local Building Project	Action Items K12	AI-0001
Oak Hills Local Building Project	Request for Interpretation K12	RFI-0001
Oak Hills Local Building Project	Contract Modification K12	CM-0001
Oak Hills Local Building Project	Contract Schedule of Values K12	SOV-0001
Oak Hills Local Building Project	Miscellaneous Commit K12	MC-0001

Record Details:

General

Project Number	SFC-080001.01	Record Number	SUB-0007
Project Name	Oak Hills Local Building Project	Creator	Katie Tuttle
Organization Name		Creation Date	06/23/2017 01:29 PM (UTC-8)
Facility Name		Status	Pending
Title	Floor Tile	Due Date	
Contract Name	Test - CMR	Contract No.	072215
		Contractor Name	Joe General Contractor

A/E Review

- ▶ Click Accept Task

Submittals K12 - Floor Tile - Project No. SFC-080001.01 - Mozilla Firefox

https://ohio-dev-unifier.oracleindustry.com/bp/process/task/open?task_id=187141&parent_id=0&viewOnly=0&project_id=1086&_uref=uuu21 110%

File Edit View Actions Help

Accept Task Decline Task Review Close Window

Submittals K12

General

Project Number: SFC-080001.01 Record Number: SUB-0007
Project Name: Oak Hills Local Building Project Creator: Katie Tuttle
Organization Name: Creation Date: 06/23/2017 01:29 PM (UTC-8)
Facility Name: Status: Pending
Title: Due Date:

Task Details

From: Katie Tuttle Task Due Date: 07/07/2017 Task Notes (0)
To: A_E:Archana Atrey: More Task Status: Not Started Workflow Progress
Cc:
Sent For: AE Review

Submittals List

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

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

Attachments	Name	Line Item Status	Status Date	Variation?	Type
	Test document 2.pdf	Submitted		No	

Comments Download Find References

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

A/E Review

- ▶ Review the Submittal record, Attachments and any submittal items received by courier or other means for conformance with Contract requirements.
- ▶ The submitted items may be part of the electronic record or may be a hard copy document, sample, etc.
- ▶ If the submittal item is not attached to the record, record the Received Date of each item in the lower form Non-Electronic Submissions Block.
- ▶ All electronic submissions will automatically record the Sent and Received Dates.

Submittals K12 - Floor Tile - Project No. SFC-080001.01 - Mozilla Firefox

https://ohio-dev-unifier.oradeindustry.com/bp/process/task/open?task_id=187141&model=us1k&project_id=1086&initiateBP=&bulkautoaccept 110%

File Edit View Actions Help

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

Submittals K12

General

Action Details

Standard

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

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

Name	Line Item	Status	Status Date	Variation?	Type
Test document 2.pdf		Submitted		No	

Add Copy Import Remove Comments Download

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

A/E Review

- ▶ When the review of a submittal item is completed, in the lower form, open the Submittal Line Item record for the submitted item and enter the appropriate review determination in the Line Item Status field.
- ▶ The default status will read Submitted.
- ▶ Enter Conformed, Conformed as Noted, Revise and Resubmit or No Action Required.
- ▶ Enter the Status Date when one of the four final review determinations is entered.

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

- Name:
- Type:
- Variation from Contract Documents?:
- Description of Variation:
- Line Item Status: (dropdown menu open showing: Submitted, Conforms, Conforms as Noted, Held, No Action Required, Received, Rejected, Requested, Revise & Resubmit, Submitted)
- Status Date:
- Non-Electronic Submissions:
- Sent Date:
- How Was It Sent?:
- Notes:
- Publish Submittals:
- Path:

At the bottom of the form, there are "OK" and "Cancel" buttons, and a link for "Linked Records (0)".

A/E Review

- ▶ Notice that the line item status has changed from “Submitted” to “Conforms as Noted”

The screenshot shows a web browser window titled "Submittals K12 - Floor Tile - Project No. SFC-080001.01 - Mozilla Firefox". The address bar shows the URL: https://ohio-dev-unifier.oracleindustry.com/bp/process/task/open?task_id=187141&model=us1k&project_id=1086&initiateBP=&bulkautoaccept. The page displays a "Submittals K12" interface with a menu bar (File, Edit, View, Actions, Help) and a toolbar (Send, Save, Spelling, Discussion, Review, Close Window). The main content area is divided into sections: "General", "Action Details", and "Standard". The "Standard" section shows an "Attachment Index" with 1 item(s) and a "Current View" of "All". A table of attachments is displayed, with the following data:

Name	Line Item Status	Status Date	Variation?	Type
Test document 2.pdf	Conforms as Noted		No	

A red arrow points to the "Line Item Status" column header, and a red box highlights the value "Conforms as Noted" in the first row. The bottom of the interface includes a toolbar with "Add", "Copy", "Import", "Remove", "Comments", and "Download" buttons, and a footer with "Linked Records (0)", "General Comments", and "Linked Mail (0)".

A/E Review

- ▶ Choose the appropriate workflow action:
 - ▶ Accepted -> Record goes to the End step
 - ▶ Send for Consultant Review
 - ▶ Return for Clarification -> Goes back to the Contractor
 - ▶ Send Hold Notice
- ▶ Click Send

Submittals K12 - Floor Tile - Project No. SFC-080001.01 - Mozilla Firefox

https://ohio-dev-unifier.oracleindustry.com/bp/process/task/open?task_id=187141&model=us1k&project_id=1086&initiateBP=&bulkautoaccept 110%

File Edit View Actions Help

Workflow Actions: Accept (dropdown), Send (button)

General

- Accept
- Send for Consultant Review
- Return for Clarification
- Send Hold Notice

Record Number: SUB-0007

Creator: Katie Tuttle

Creation Date: 06/23/2017 01:29 PM (UTC-8)

Status: Pending

Due Date:

Organization Name:

Facility Name:

Title: Floor Tile

Action Details

Accept (Click here to view latest content)

To...

Cc...

Send For: End

Task Notes:

Workflow Progress

Standard

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

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

Name	Line Item Status	Status Date	Variation?	Type
Test document 2.pdf	Conforms as Noted		No	

Add Copy Import Remove Comments Download

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

Questions?

Please contact OAKS CI Support Desk:

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