



Submittals Creation

K-12 Legacy

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
 - ▶ Click New

The screenshot shows the Primavera Unifier web interface. The browser address bar displays the URL: https://oaksci.osfc.ohio.gov/bp/nav/main/user#t:'us_sf',m:'user',p:1137,k:'us1'. The user is identified as Katie Tuttle. The navigation menu includes Home, Company Workspace, and School Facilities. The left sidebar shows a tree view of the system's structure, with 'Logs' and 'Submittals' highlighted. The 'New' button in the top menu is circled in red. A red arrow points from the 'Submittals' folder in the sidebar to the 'New' button. The main content area displays a list of submittal records with columns for Title and Specificati.

Title	Specificati
1001 Sanitary SewerSubmittal	
1002 Storm Sewer Submittal	
1003 Water Distribution Submittal	
1004 Lime Stabilization produc data	
1005 Underground electric duct	
1006 Asphalt Paving	
1007 - Seed submittal	
RAMMED AGGREGATE PIER SUBMITTAL	
5001 - Anchor Bolt Submittal - Incorrect	
5002 - Lintel Subittal	
5003 - Structural Steel Areas A and C	
5005 - 052100/053100 Joists and deck shop dr:	
5004 033000 Concrete Mix Designs submittal	
5006 - 033000 Rebar shop drawings	
5018 - Cubicle Curtain Samples	
5020 - 101100 VDB vinyl color sample charts	
5021 042000 Masonry veneer accessories	
5036 PL300 Solids Interceptor product data	
5085 PL300 Domestic water booster pump	
5120 Insulated Metal Wall Panels	
Alt AL-2 Signage	
099100 Exterior Lintel Color Drawdowns	
5083 033000 Vapor Barrier Data	033000
5012 Masonry block and accessories	042000
042000 Sign Cast Stone Samples	042000
Sign Cast Stone	042000
Bulletin 004 Steel Shop Drawings	051200
5011 - 051200 Structural Steel Area B	051200
5001 - Anchor Bolt Submittal - Corrected	051200

Create a Submittal Record

- ▶ Complete the Upper Form (General tab)

Create New Submittals - Project No. SFC-130336.01 - Internet Explorer

https://oaksci.osfc.ohio.gov/bp/process/new?project_id=1137&module_name=us1&csvimport=false

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 a web browser window titled "Create New Submittals - Project No. SFC-130336.01 - Internet Explorer". The address bar shows the URL: https://oaksci.osfc.ohio.gov/bp/process/new?project_id=1137&module_name=us1&csvimport=false. The browser has a menu bar with "File", "Edit", "View", "Actions", and "Help". Below the menu bar is a toolbar with icons for "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 "Attachment Index : (0)" and "Current View: All". To the right, there is a dropdown for "Display Attachments with Comments by: All". Below this, there is a "New Rename Move Delete" toolbar and a "Page 1 of 1" indicator. The main content area is a table with columns: "Name", "Line Item Status", "Status Date", "Variation?", and "Type". The table is currently empty. At the bottom of the page, there is a toolbar with buttons for "Add", "Copy", "Import", "Remove", "Comments", "Download", "Find", and "Referenc". The "Add" button is circled in red, and a red arrow points to it. At the very bottom, there are three status indicators: "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

Line Item - Internet Explorer

https://oaksci.osfc.ohio.gov/bp/studio/bp/document/itemopen?group_id=-1&a=form,0&id=0&model=

Spelling... Attachment Comments

Submittals K12 Line Item:

Name: Floor Sample *

Type: Sample

Variation from Contract Documents?:

Description of Variation:

Line Item Status: Submitted

Status Date: 04/19/2016

Non-Electronic Submissions

Sent Date: 04/19/2016 Received Date:

How Was It Sent?: UPS

Notes:

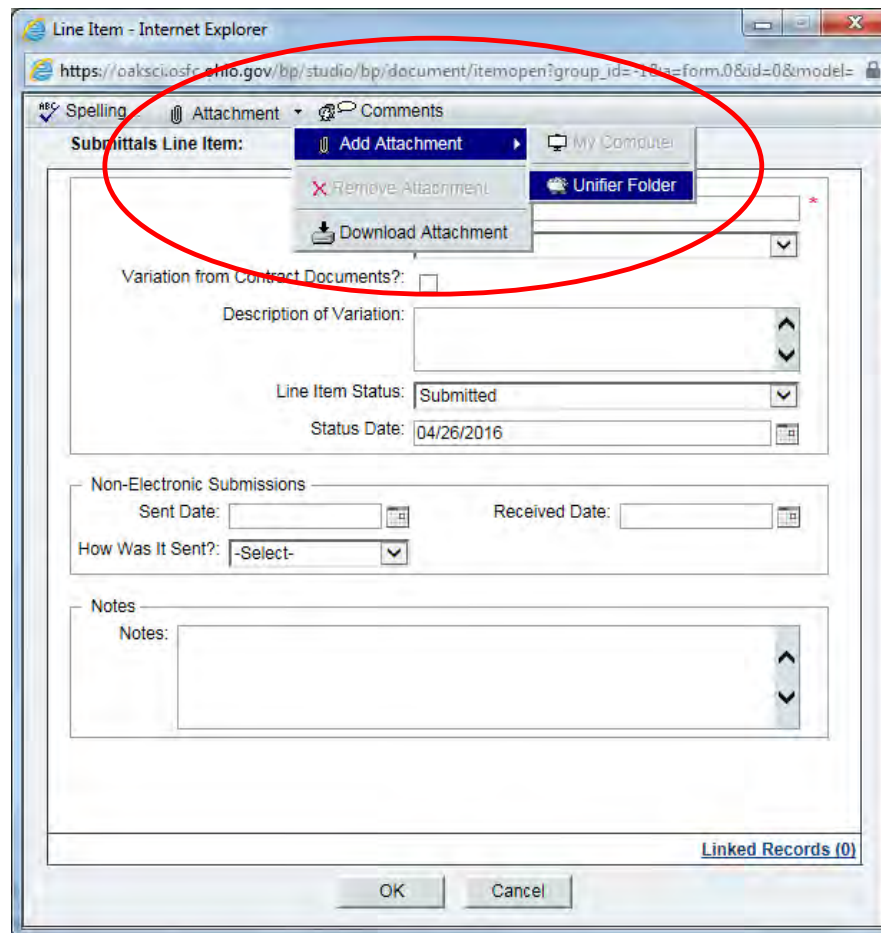
Publish Path: Submittals

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

OK Cancel

Submitting Samples Electronically

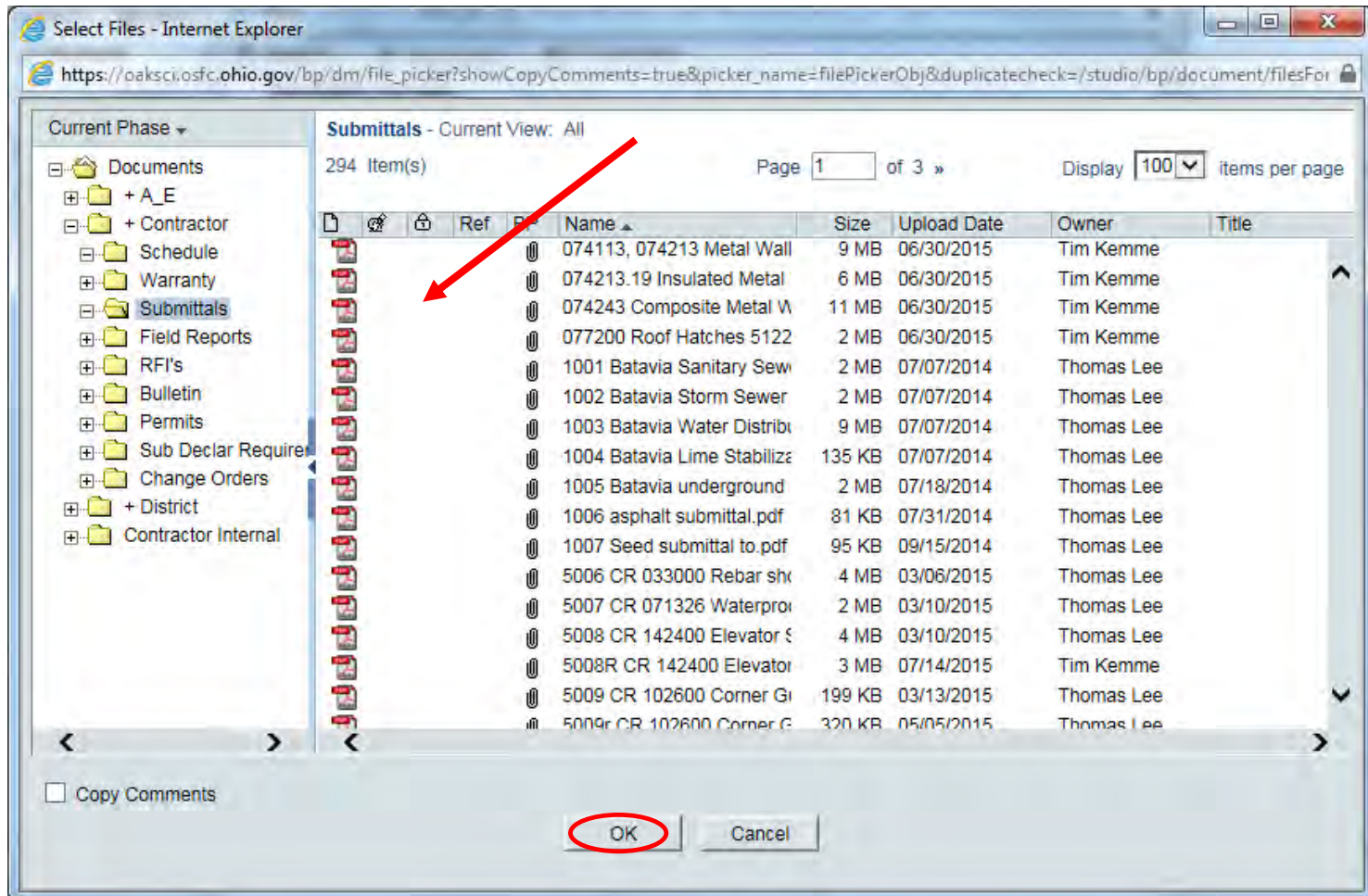
- ▶ Complete the necessary fields on the form
- ▶ Click Attachment, Add Attachment, choose Unifier Folder
- ▶ **Note:** Documents must first be uploaded to Document Manager



The screenshot shows a web browser window titled "Line Item - Internet Explorer" with the URL https://oaksciociofcmo.gov/bp/studio/bp/document/itemopen?group_id=-1&form=0&id=0&model=-. The page displays a "Submittals Line Item" form. A red circle highlights the "Attachment" menu, which is open, showing options: "Add Attachment", "Remove Attachment", and "Download Attachment". The "Add Attachment" option is further expanded to show "My Computer" and "Unifier Folder". Below the menu, the form includes fields for "Variation from Contract Documents?" (checkbox), "Description of Variation:" (text area), "Line Item Status:" (dropdown menu set to "Submitted"), and "Status Date:" (text field set to "04/26/2016"). There is also a section for "Non-Electronic Submissions" with "Sent Date:", "Received Date:", and "How Was It Sent?:" (dropdown menu set to "-Select-"). At the bottom, there is a "Notes" section with a text area and a "Linked Records (0)" link. The form has "OK" and "Cancel" buttons at the bottom.

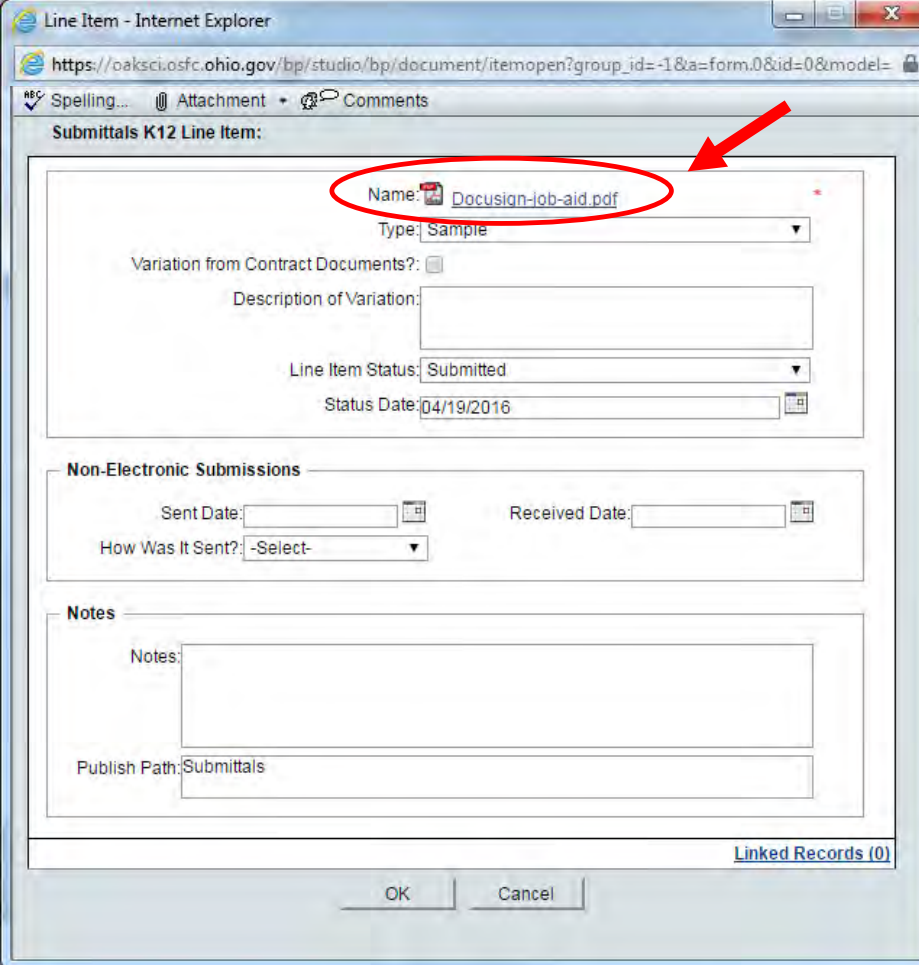
Attaching Files

- ▶ Choose the file you wish to Attach
- ▶ 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 - Internet Explorer" with the URL https://oaksci.osfc.ohio.gov/bp/studio/bp/document/itemopen?group_id=-1&a=form.0&cid=0&model=. The page content is titled "Submittals K12 Line Item:". The main form area contains the following fields:

- Name:** Docusign-job-aid.pdf (circled in red with a red arrow pointing to it)
- Type:** Sample
- Variation from Contract Documents?:**
- Description of Variation:** [Empty text box]
- Line Item Status:** Submitted
- Status Date:** 04/19/2016

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

- Sent Date:** [Empty date field]
- Received Date:** [Empty date field]
- How Was It Sent?:** -Select-

At the bottom of the form is a "Notes" section with a text area and a "Publish Path" field containing the text "Submittals". At the very bottom of the window are "OK" and "Cancel" buttons, and a link for "Linked Records (0)".

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 - Project No. SFC-130336.01 - Internet Explorer". The URL is https://oaksci.osfc.ohio.gov/bp/process/new?project_id=1137&module_name=us1&csvimport=false. The page has a menu bar with "File", "Edit", "View", "Actions", and "Help". Below the menu bar are icons for "Send", "Save", "Spelling..", "Discussion", and "Close Window". The main content area 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". To the right, there is a "Display Attachments with Comments by:" dropdown set to "All". Below that, there are "New", "Rename", "Move", and "Delete" buttons, followed by "1 Item(s)", "Page 1 of 1", and "Display 100 Items Per Page". On the left, there is an "Attachments" folder icon. The main table has the following data:

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

At the bottom of the page, there are buttons for "Add", "Copy", "Import", "Remove", "Comments", "Download", "Find", and "Refer". At the very bottom, there are links for "Linked Records (0)", "General Comments", and "Linked Mail (0)". A red box highlights the table row, and a red arrow points to it.

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

Workflow Actions: Submit, Submit, Submit via Transit

Project Number: SFC-080001.01
Project Name: Oak Hills Local Building Project
Organization Name:
Facility Name:
Record Number:
Creator: Katie Tuttle
Creation Date:
Status:
Due Date:

Title: Test Submittal

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:

oaksci@ofcc.ohio.gov

614.644.2211