



Submittal Creation

K12

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any slide to return to this page*



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



Roles & Responsibilities

▶ Contractor

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

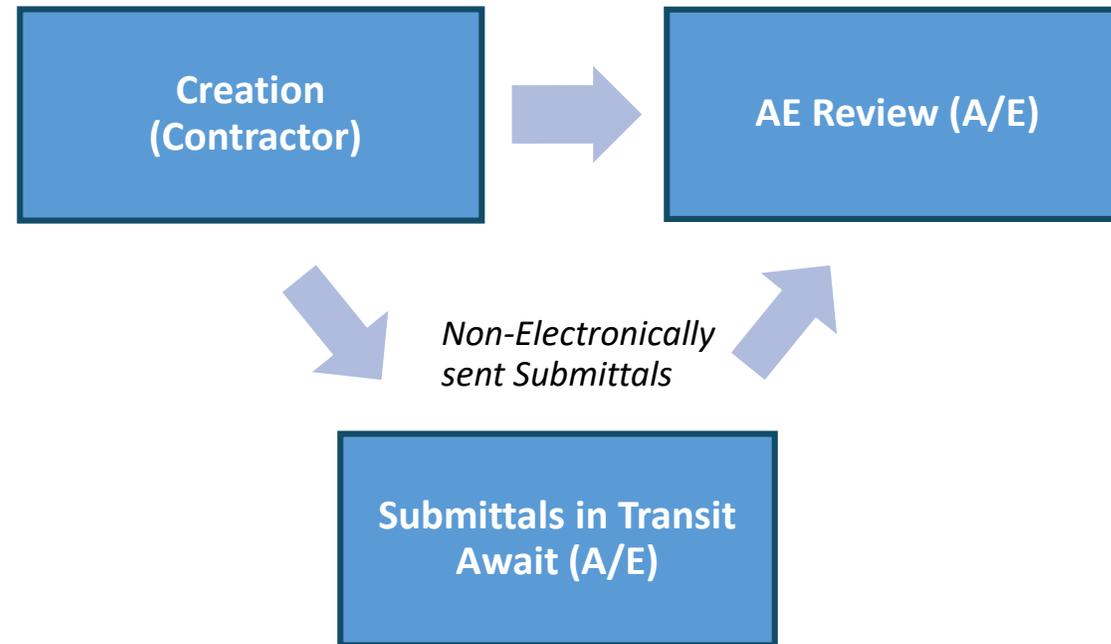
▶ Associate (A/E)

- ▶ 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



Submittals – Workflow Steps

Click the boxes to navigate directly to each section



Create Submittals (Contractor)



Create Submittals

Log into OAKS CI and Follow these steps to Create a new record:

1. Click **Logs** to expand
2. Scroll down if necessary, Select **Submittals K12**
3. Click the **Create** button

The screenshot shows the Oracle Primavera Unifier (Development) interface. The left sidebar contains a navigation menu with various categories. A red circle with the number '1' points to the 'Logs' category, which is expanded to show a list of sub-items. A red circle with the number '2' points to the 'Submittals K12' item in this list, which is highlighted with a red box. The main content area displays the 'Submittals K12' table. A red circle with the number '3' points to the '+ Create' button located at the top left of the table. The table itself has columns for 'Title' and 'Specification S' and contains several rows of data.

Title	Specification S
Floor Tile	
Floor Tile	
HVAC Equipment	
Joe's Submittal 080001-03	
Mailing Submittal	
Matt's Consulting OCI-00081_PR7	
Pipe Submittal	
products	
Sample of roofing material	
Spec #2 Concrete	
Submittal #2	
Test Submittal	
Test Submittal	778B



Complete General Tab

- ▶ Fill out all of the information in the General Tab
- ▶ The sections marked with a red * are required

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

ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/new/us1k/1086/3020?__uref=uuu925778772t4

Create New Submittals K12

Send Save

General Submittals List

Project Number SFC-080001.01	Record Number
Project Name Oak Hills Local Building Project	Creator Matthew Weber
Organization Name	Creation Date
Facility Name	Status
Title * Joe's Submittal 08001_07	Due Date
Contract Name Test - CMR	
Contract No. 072215	Contractor Name Joe General Contractor
	Drawing No.
	Specification Section

Comments Linked Records Linked Mail

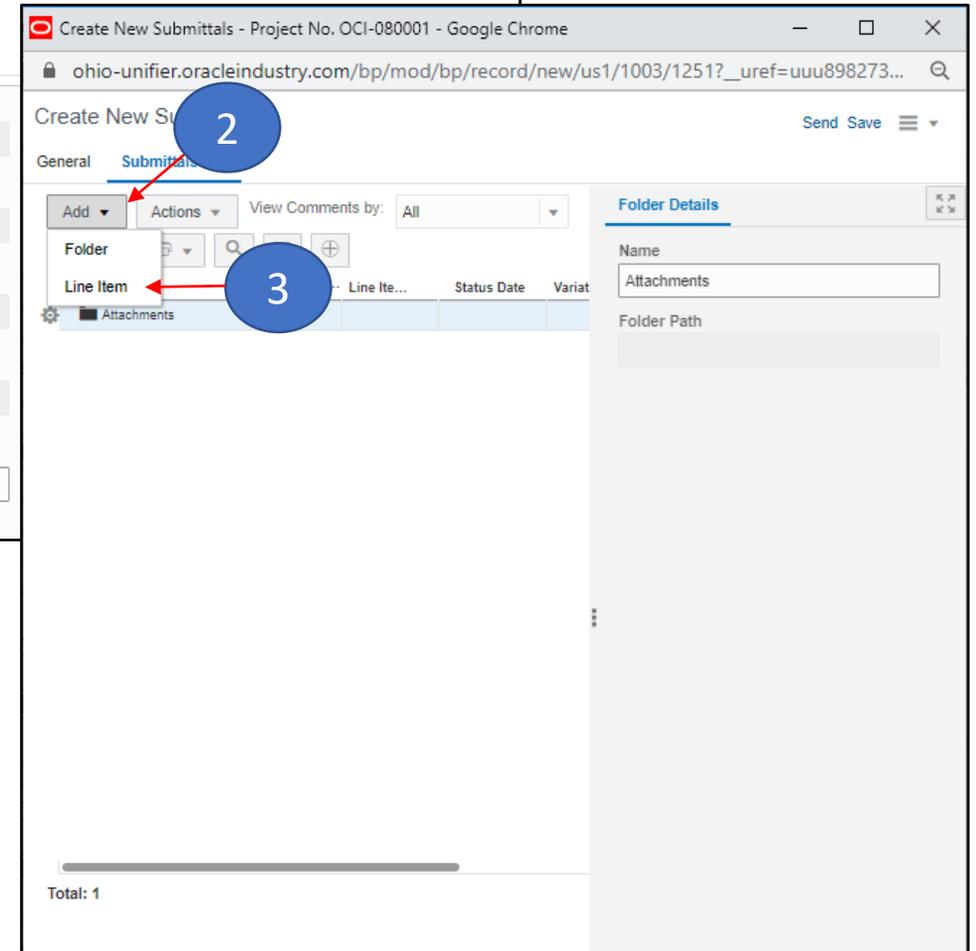
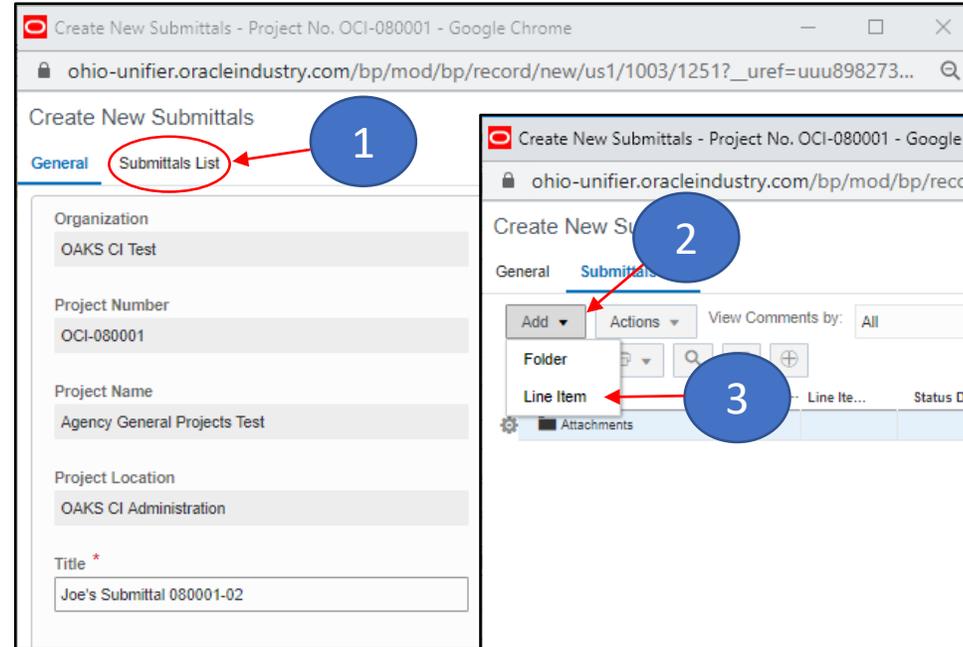
Hide Clear Post

Information
No Comments are available.



Add Line Items

1. Open **Submittals List**
2. Click **Add**
3. Select **Line Item**



Submitting Samples by Mail

When sending the Submittal through the mail:

- a) In the top section fill out all fields as necessary
- b) Add **Sent Date** for Non-Electronic Submission
- c) Click **Save** or **Save & Add New**

a

b

c

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

ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/new/us1k/1086/...

Create New Submittals K12 Send Save

General Submittals List

Line Item D >

Name
Tile Color Sample

Type
Sample

Variation from Contract Documents?

Description of Variation

Line Item Status
Submitted

Status Date
04/10/2020

Non-Electronic Submissions

Sent Date
04/10/2020

Received Date
MM/DD/YYYY

How Was It Sent?
UPS

Notes

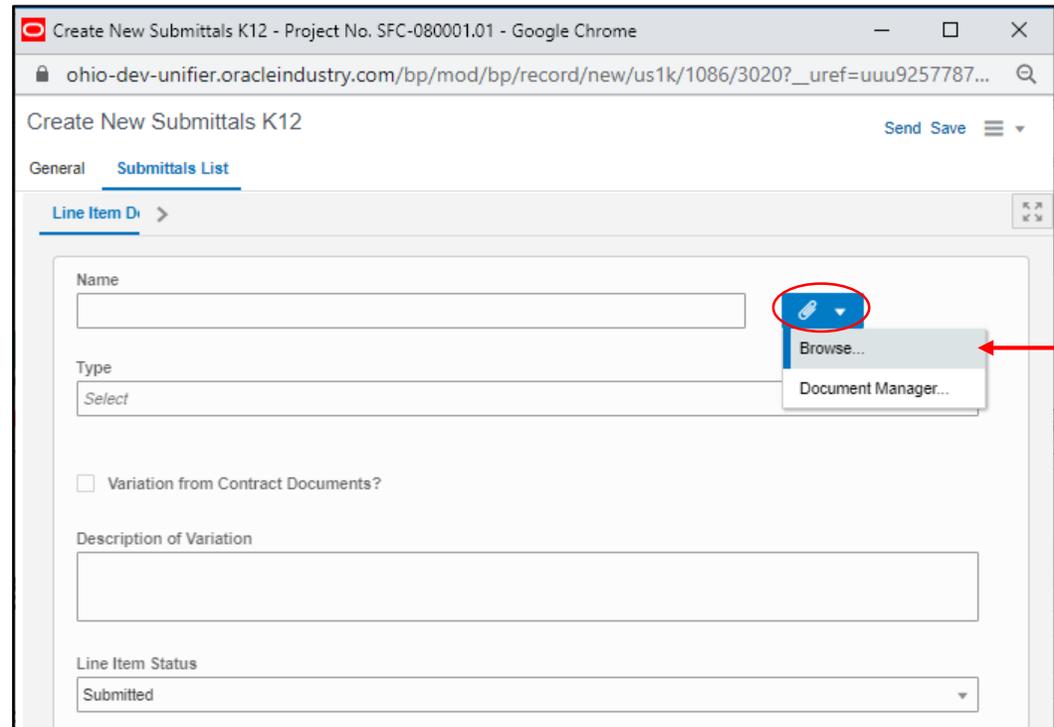
Cancel Save Save & Add New



Submitting Samples Electronically

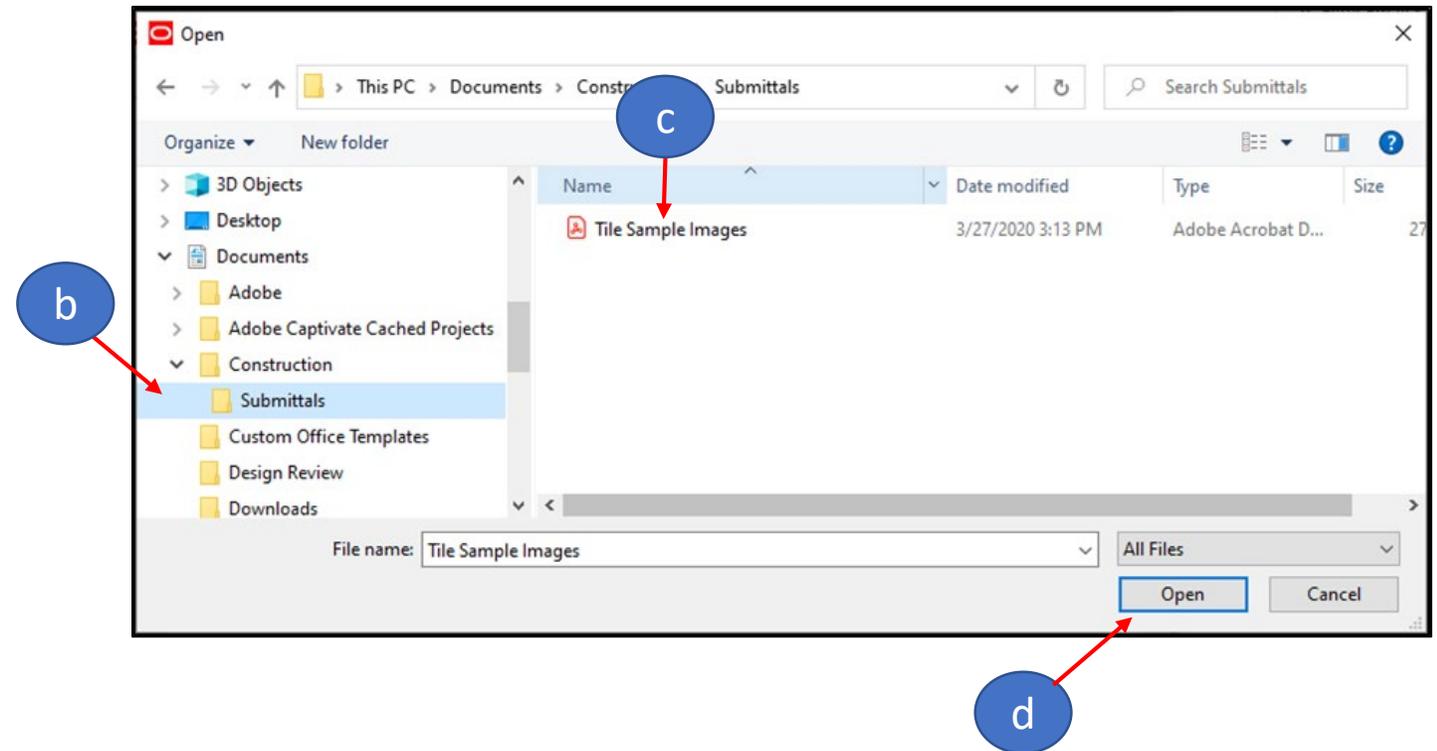
When submitting samples electronically:

- a) Upload the document from your computer by clicking the **Attachment Button** - > **Browse**



Submitting Samples Electronically – Add Attachments

- a) Navigate to the folder where your documents are stored
- b) Select the attachment you want to upload
- c) Click **Open**



Submitting Samples Electronically

- ▶ The Name field will be automatically populated by the attached file
- ▶ Click the **Type** field to open the drop-down, and make a selection from the list
- ▶ Click **Save** or **Save and Add New**

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

ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/new/us1k/1086/3020?_ur...

Create New Submittals K12 Send Save

General Submittals List

Line Item Di >

Name
Tile Sample Images.pdf

Type
Select
Informational
LEED
Moci-Up Review
Product Data
Sample
Shop Drawing
Warranty

Line Item Status
Submitted

Status Date
04/10/2020

Non-Electronic Submissions
Sent Date
MM/DD/YYYY
Received Date
MM/DD/YYYY
How Was It Sent?
Select

Notes

Cancel **Save** Save & Add New



Submittal Record

- ▶ After saving, the details of your submittal record will be added to the Submittals List tab
- ▶ Once both the General and Submittals List sections are complete, click **Send** to submit the record

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

ohio-dev-unifier.oracleindustry.com/bp/mod/bp/record/new/us1k/1086/3020?__uref=uuu9257787...

Create New Submittals K12

General Submittals List

Add Actions

View Comments by: All

Name	Line It...	Status	Date
Tile Sample Image...		Submitted	04/10/2020

Name: Tile Sample Images.pdf

Type: Sample

Variation from Contract Documents?

Description of Variation

Line Item Status: Submitted

Status Date: 04/10/2020

Non-Electronic Submissions

Sent Date: MM/DD/YYYY Received Date: MM/DD/YYYY

How Was It Sent?: Select

Total: 2

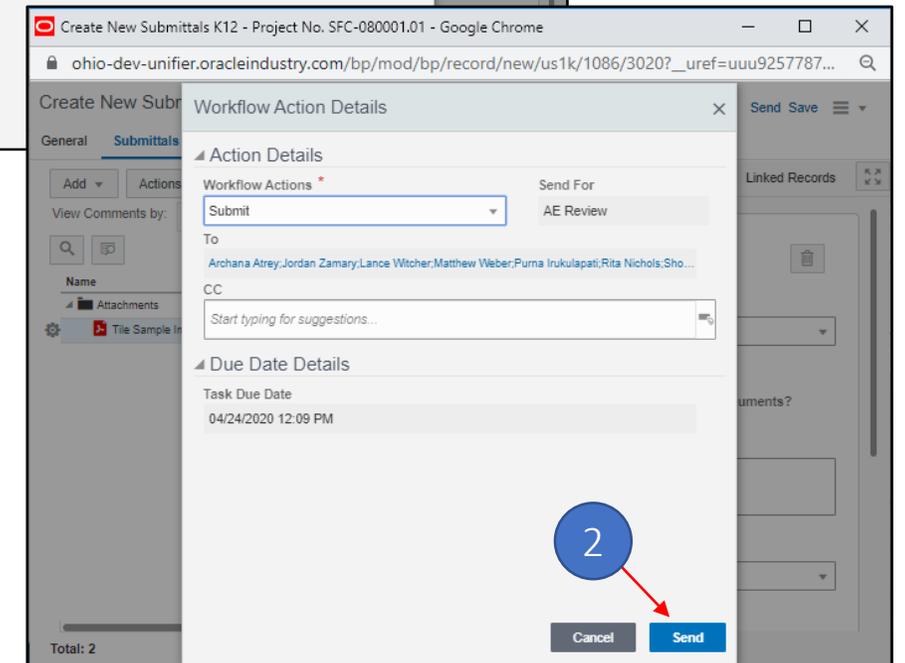
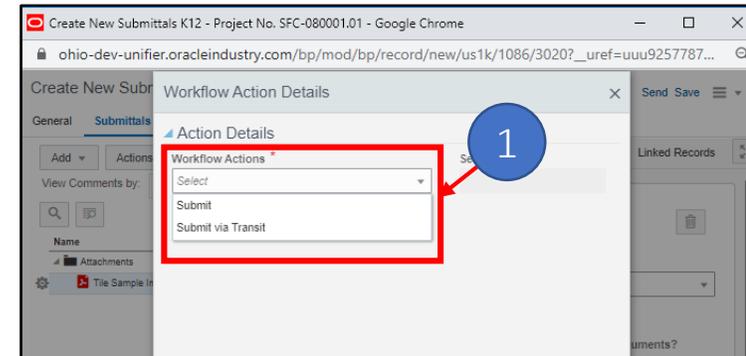
Cancel Save



Send Record for Approval

1) Click **Send**

- ▶ Choose **Submit** if you sent the Submittal electronically. The record will move forward to A/E for AE Review.
- ▶ Choose **Submit via Transit** if the Submittal was sent through mail or courier. The record will move the forward to A/E for Submittals in Transit Await.



2) Click **Send**



Questions?

Please contact OAKS CI Support Desk:

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