



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**

Create a Submittal Record- Contractor

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

The screenshot displays the Oracle Primavera Unifier (Development) interface. The breadcrumb navigation shows 'School Facilities' > 'OAKS CI District ...'. The left-hand navigation menu is open, with 'Logs' circled in red. Below 'Logs', 'Submittals K12' is highlighted, and a red arrow points to it from the text instructions. In the main content area, the 'Submittals K12' page is shown, with a '+ Create' button circled in red. Below the button is a table with the following data:

Title
Test Submittal
Mailing Submittal
products
Floor Tile
Sample of roofing material
Test Submittal

At the bottom of the interface, a 'Total: 6' label is visible.

Create a Submittal Record

- ▶ Complete the General Tab
- ▶ Required fields marked with a red *

Create New Submittals K12 - Project No. SFC-080001.01 - Mozilla Firefox

https://ohio-dev-unifier.oracleindustry.com/bp/process/new?fromMasterLog=1&wftemplate_id=3020&module_name=us1k&project_id=

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:

Facility Name:

Title: Pipe Submittal *

Creation Date:

Status:

Contract Name: Test Contract 3 Select... Due Date:

Contract No.: 123456 Contractor Name: Joe General Contractor

Drawing No.:

Specification Section:

Notes

Notes:

Document Publishing

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 K12 - Project No. SFC-080001.01 - Mozilla Firefox". The address bar shows the URL: https://ohio-dev-unifier.oracleindustry.com/bp/process/new?fromMasterLog=1&wftemplate_id=3020&module_name=us1k&project_id=

The interface includes a menu bar with "File", "Edit", "View", "Actions", and "Help". Below this is a "Workflow Actions" bar with options: "-Select-", "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 and circled in red. Below the tabs, there is a section for "Attachments" with a "New" button and "Rename", "Move", "Delete" options. The "Current View" is set to "All". The "Attachment Index" is (0). The "Page" is 1 of 1. The "Display Attachments with Comments by:" is set to "Display".

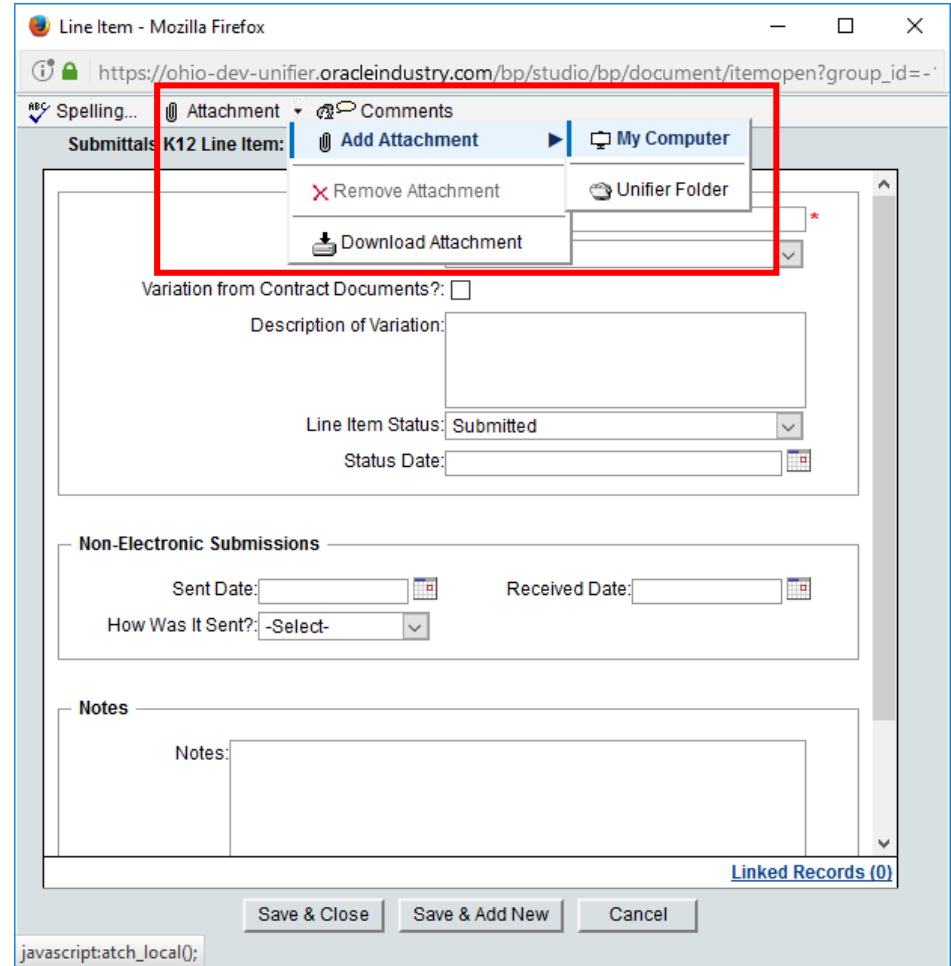
The main table has columns: "Name", "Line Item Status", "Status Date", "Variation?", and "Type". The table is currently empty.

At the bottom of the interface, there is a toolbar with buttons: "Add", "Copy", "Import", "Remove", "Comments", and "Download". The "Add" button is circled in red, and a red arrow points to it from above.

At the very bottom, there are three sections: "Linked Records (0)", "General Comments", and "Linked Mail (0)".

Submitting Samples Electronically

- ▶ Add a submittal document: Click Attachment, Add Attachment, choose My Computer
- ▶ Choose file to add
 - ▶ *For more information on adding documents, please see the “Attach Documents” job aid*



Submitting Samples Electronically

- ▶ You'll see your attached document at the top of your Line Item window
- ▶ To add another submittal document, click "Save & Add New" to return to the Submittal Record screen click "Save & Close"

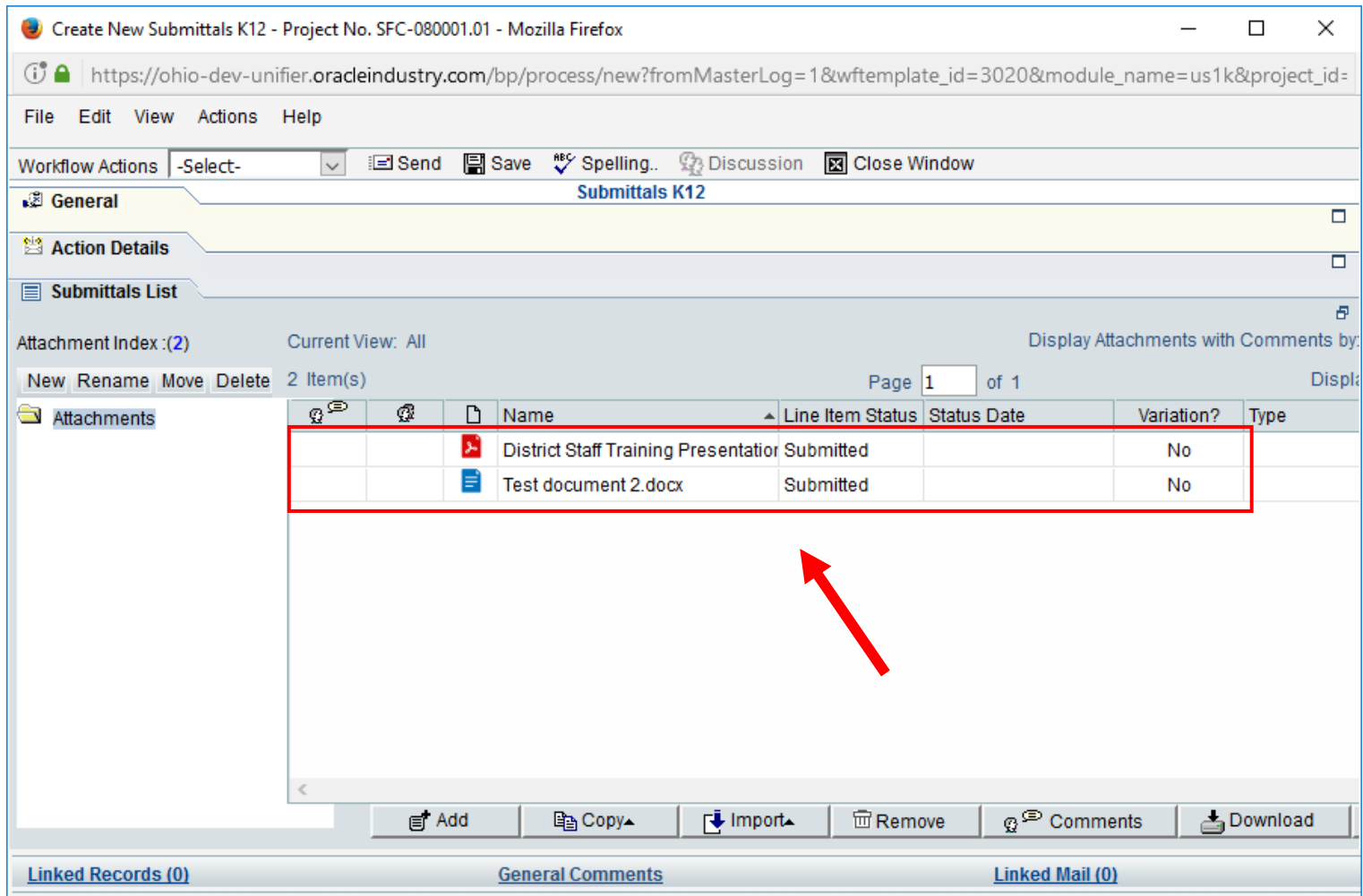
The screenshot shows a web browser window titled "Line Item - Mozilla Firefox" with the URL "https://ohio-dev-unifier.oracleindustry.com/bp/studio/bp/document/itemopen?group_id=-". The page content is titled "Submittals K12 Line Item:" and contains a form with the following fields:

- Name:** Test document 2.docx (circled in red)
- Type:** -Select-
- Variation from Contract Documents?:**
- Description of Variation:** (empty text area)
- Line Item Status:** Submitted
- Status Date:** (calendar icon)
- Non-Electronic Submissions:**
 - Sent Date:** (calendar icon)
 - Received Date:** (calendar icon)
 - How Was It Sent?:** -Select-
- Notes:** (empty text area)

At the bottom of the form, there are three buttons: "Save & Close", "Save & Add New", and "Cancel". The "Save & Close" and "Save & Add New" buttons are circled in red. A red arrow points to the top right corner of the form area. A "Linked Records (0)" link is visible at the bottom right of the form.

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 - Mozilla Firefox". The address bar shows the URL: https://ohio-dev-unifier.oracleindustry.com/bp/process/new?fromMasterLog=1&wftemplate_id=3020&module_name=us1k&project_id=. 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 titled "Submittals K12" and has three tabs: "General", "Action Details", and "Submittals List". The "Submittals List" tab is active, showing an "Attachment Index : (2)" and "Current View: All". Below this, there are options for "New", "Rename", "Move", and "Delete", and a "2 Item(s)" indicator. A table displays the attachments, with a red box highlighting the two rows. A red arrow points to the table area.

Name	Line Item Status	Status Date	Variation?	Type
District Staff Training Presentation	Submitted		No	
Test document 2.docx	Submitted		No	

At the bottom of the interface, there are buttons for "Add", "Copy", "Import", "Remove", "Comments", and "Download". Below the main content area, there are links for "Linked Records (0)", "General Comments", and "Linked Mail (0)".

Routing for Approval

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

Create New Submittals K12 - Project No. SFC-080001.01 - Mozilla Firefox

https://ohio-dev-unifier.oracleindustry.com/bp/process/new?fromMasterLog=1&wftemplate_id=3020&module_name=us1k&project_id=...

File Edit View Actions Help

Workflow Actions Submit [v] Send Save Spelling.. Discussion Close Window

General Submit Submit via Transit

Project Number: SFC-080001.01 Record Number: []

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

Organization Name: [] Creation Date: []

Facility Name: [] Status: []

Action Details

Submit

To... Archana Atrey, Barbara Taylor, Bill Schwertfager Task Due: 07/03/2017

Cc... []

Send For: AE Review

Standard

Attachment Index: (2) Current View: All Display Attachments with Comments by:

New Rename Move Delete 2 Item(s) Page 1 of 1 Display

Name	Line Item Status	Status Date	Variation?	Type
District Staff Training Presentation Submitted			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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