

## Submittal Document Creation

### What is a Submittal Document?

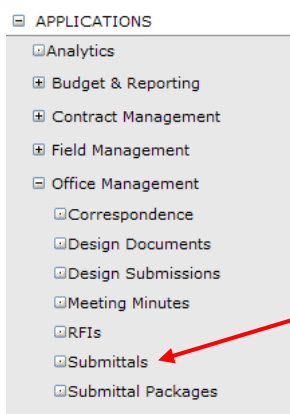
A submittal is a specific type of catalog card that represents an object that can be circulated for review in a package. Submittals represent documents and items that contractually require approval by stakeholders. Submittals can include electronic documents, such as schedules, or they can represent physical items such as floor samples. The Project Manager and/or Construction Manager creates an initial submittal schedule in the submittal module. A submittal schedule is populated with all the required submissions for a project per specifications with due dates. As submittals are received they are added to a submittal package for review.

### Who Will Use This?

- ✓ General Contractor
- ✓ Construction Manager
- ✓ Architect/Engineer
- ✓ Project Manager

## Steps to Create a Submittal

1. Log into ePM as a user with the Submittal Schedule Creator security role, then navigate to the appropriate project.
2. Navigate to Applications > Office Management > Submittals to display the Submittals register.



3. Click the 'New' button to open a blank Submittal document. In the 'File/URL Information' section, upload a related document (product data, etc). In the Name field, enter a name for the submittal. Select the Specification Section, Submittal Classification, and Discipline from the appropriate lookup lists.

The screenshot shows the 'SUBMITTAL: New Document' form in a web application. The form has two tabs: 'General' and 'Workflow'. The 'General' tab is active. The form is titled 'SUBMITTAL: New Document' and has a 'Draft' status indicator. Below the title, there are navigation links: 'Main', 'Review Process', and 'Properties'. The 'DETAILS' section is expanded, showing a list of fields:

Current State :	Draft
Number :	<input type="text"/>
Name :	* <input type="text" value="Tile Samples"/>
Revision Number :	* <input type="text" value="R00"/>
Title :	Tile Samples - R00
Comments :	<input type="text"/>
Specification Section :	09 06 30 : Schedules for Tiling <input type="button" value="lookup"/>
Submittal Classification :	REQ : Required <input type="button" value="lookup"/>
Actual Revision Date :	<input type="text"/> <input type="button" value="calendar"/>
Due Date :	10/01/2009 <input type="button" value="calendar"/>
Received Date :	<input type="text"/> <input type="button" value="calendar"/>
Discipline :	A : Architectural <input type="button" value="lookup"/>
Cancelled Reason :	
Has Change Marks :	No

Below the 'DETAILS' section, there is a 'PARTIES' section which is currently collapsed.

4. Save the document. Saving enables the 'Attachments' tab. To attach other external documents or URLs, click the Attachments tab, then close it.
5. This submittal is now ready for inclusion in a Submittal Package.

## Tips

- ✓ Required fields are marked with an asterisk.
- ✓ Use the 'Forward' button if collaboration required from other users.
- ✓ Click on the **Activity Log** tab to view the audit trail of the document.
- ✓ Clicking the online help button provides generic help related to contracts, NOT for the specific uses of GSA's submittal documents.



- ✓ To explode or collapse sections in a document, click on the double headed arrow buttons:



- ✓ Notices with yellow icons require action; blue means a document was forwarded; white means you were cc'd.
- ✓ If the Submittal requires more attachments than what can be attached in the 'File/URL Information' section, use the 'Attachments' tab, which appears after saving the Submittal.
- ✓ For additional help and support, contact your GSA Regional Point of Contact: