

Kahua Quick Reference Guide

Submittal Registry Wizard

Project Lifecycle Applicability



About the Submittal Registry Wizard

The Submittal Registry Wizard provides an efficient way to generate multiple Submittal Items for a CSI section in a single location. It also allows you to view specification pages that are attached to a record in the CSI Codes app directly from the Registry Wizard window.

[Upload Specifications to the CSI Code App \(optional\)](#)

[Use the Registry Wizard](#)

[Resources](#)

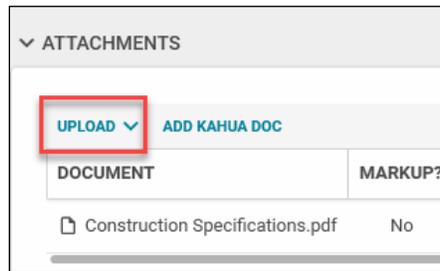
[Related QRGs](#)

Upload Specifications to the CSI Code App (optional)

This action is typically created by the following roles: **GSA PM** and **EXT-PM**.

Attaching the specification documents in the CSI Codes application allows you to open it in the Registry Wizard to view while entering the Submittal Items information. You can upload the entire spec book to the Attachments section of the 01 00 00 General Requirements CSI Code record or individual spec sections to the Attachments section of the applicable CSI Code record.

1. Open the **Project**.
2. Select **CSI Codes** from the app launcher.
3. Open the CSI Code record to **Edit** mode.
4. Upload the spec book or section to the **Attachments** section.

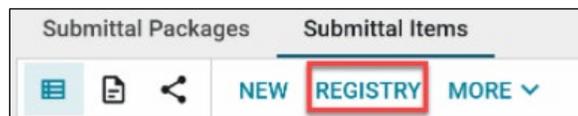


5. **Save** the record.

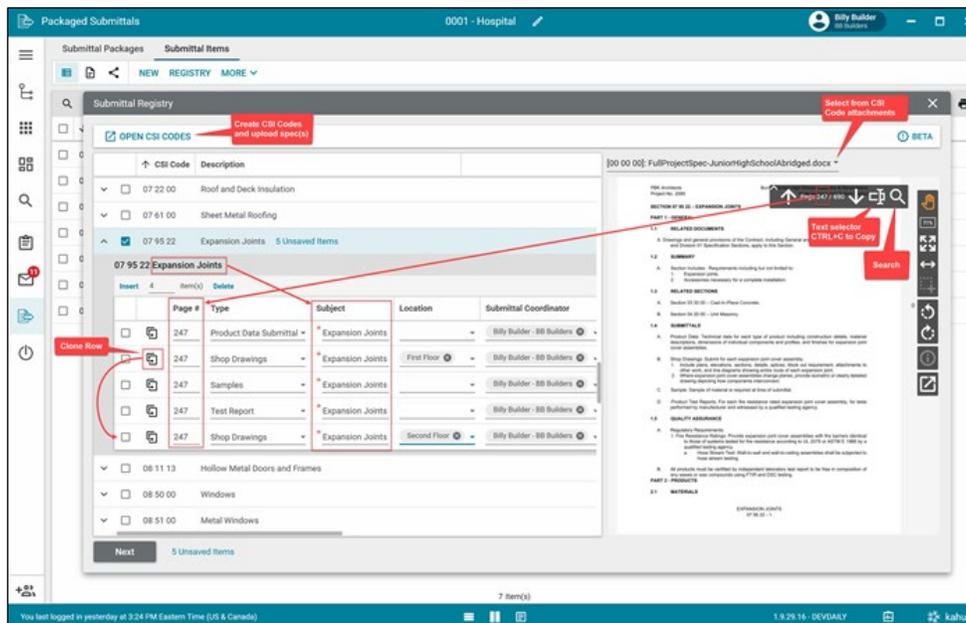
Use the Registry Wizard

This action is typically created by the following roles: **GSA PM**, **EXT-PM**, and **EXT-CONTRACTOR**.

1. Click the **Submittal Items** tab.
2. Click the **Registry** button to open the Submittal Registry window.



3. The Submittal Registry window will open with a list of CSI codes on the left and if the spec book or sections were uploaded in the CSI Codes app, the first spec file it finds in the viewer on the right.



4. If using the viewer, search or scroll through the spec in the viewer to find the area of the spec that calls out the submittal requirements.

5. Select the appropriate **CSI Code** on the left and expand the selection.
6. Insert the appropriate number of rows within the grid for each code based on the different types of submittals requested for the selected code. The Subject will populate based on the description of the CSI code. Other attributes will auto populate based on the default settings established in configuration for the project.

Note: It is recommended that you reformat the Subject to include the spec number, Spec description, and the submittal Type. The page number will auto populate based on the current page open in the viewer.

07 70 00 Roof And Wall Specialties And Accessories					
Insert		1	item(s)		Delete
		Page #	Type	Subject	Loc
<input type="checkbox"/>		78	Product Data Submittal	* 077253 Roof And Wall Specialties And Accessories - Product Data	
<input type="checkbox"/>		78	Shop Drawings	* 077253 Roof And Wall Specialties And Accessories - Shop Drawings	

7. Fill in the content for each item as needed.
 - Users may copy/paste content from the viewer into an attribute. For example, copy the submittal detail from the spec into the description attribute within the grid.
 - Use the **Clone** button at the beginning of each row to create a clone of the submittal item. This is very useful when there are multiple similar items which will necessitate their own submittal. For example, if multiple Product Data submittals are required for different sizes of materials or there are multiple Shop Drawing submittals required for different locations, simply create the first one with all of the content and clone it. Once cloned, a user can make the adjustments need for the additional submittals.
8. Repeat steps 4 – 7 as needed.
9. Click **Next** to advance to the next step.
10. Complete additional information, including any required fields.
 - Utilize the **Copy to All** and **Copy to Selected** functions to enter the same information for multiple rows.
11. Click **Save**. This will create the new Submittal Items and return the user to the log view.
12. Click **Submit** when the submittal items are ready for the Submitting Vendor to complete any additional information.

Resources

For more help with this or any other Kahua application, you can access the Calendar for Instructor-led training, Self-paced videos, or additional Quick Reference Guides (QRGs) from this link: [Training: Project management tool | GSA](#)

Related QRGs

[Packaged Submittals](#)