

# ePM Quick Reference Guide #14

## Submittal Document Creation



### WHAT IS...

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 create 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 (i.e. submittal register). As submittals are received they are added to a submittal package for review.

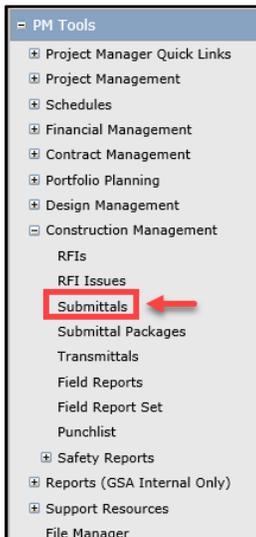
### WHO USES...

- Construction Manager
- Project Manager & Staff
- Architect/Engineer & Staff
- General Contractor

### HOW TO...

#### A. CREATE A SUBMITTAL DOCUMENT

1. Log into ePM as a user with the Office: Submittal- Editor or Approver security role, then navigate to the appropriate project.
2. Navigate to PM Tools>Construction Management>Submittals to display the Submittals register.



3. Click 'New' at the top of the Submittal Register to open a blank Submittal document.
4. A blank Submittal document will populate in another window.

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- In the Details section, enter the name of the Submittal in the Name field. Select the Specification Section, Submittal Classification and Discipline from the appropriate lookup lists, and enter any other related data to the fields as needed.

- There are two areas where you may attach any files associated with the Submittal
  - In the 'File/URL Information' section, upload a related document (product data, etc.) by clicking on the icon.

- Under Attachments section, click 'Add Line'. Locate and select file(s). Click 'Open' then click 'Attach'.

- Click 'Save' to save the document. Saving enables the 'Attachments' tab to attach other external documents or URLs. If you would like to attach an external document, click Attachments tab, then

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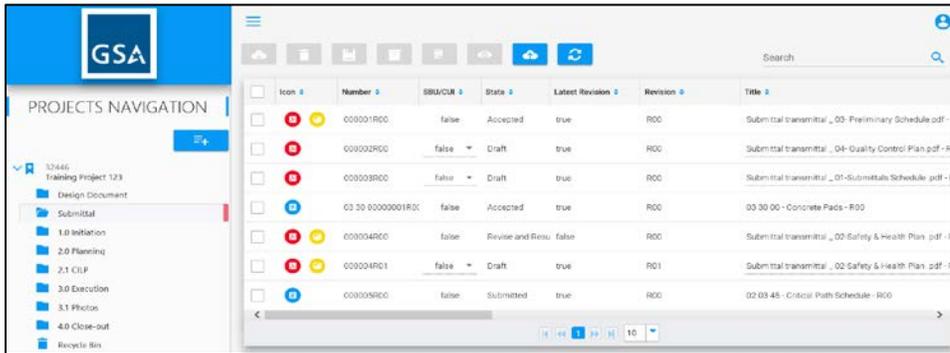
select either Attached Files and Links or Attached Proliance Documents to link documents within ePM.



- This submittal is now ready for inclusion in a Submittal Package. Please refer to [QRG 015: Submittal Package Review](#).

### B. CREATE A SUBMITTAL DOCUMENT (FILE MANAGEMENT TOOL)

- Launch the File Management Tool from the [ePM Portal](#).
- Click the icon to select the project.
- Expand the folder structure, open the Submittal folder.
- Drag a drop the Submittal file (PDF) within the Submittal folder contents.



- The Submittal file will be uploaded and Submittal Document saved within ePM.

## REFERENCES

Reference the following ePM Quick Reference Guides (QRGs) for additional information. QRGs can be accessed through the [ePM Portal](#).

- QRG 15 - Submittal Package Review
- QRG 16 - Submittal Package Management and Completion