

ePM Quick Reference Guide #15

Submittal Package Review

WHAT IS...

A submittal package represents a collection of submittals that will be sent to a series of reviewers for feedback. The designated manager of the package reviews the feedback and makes a final determination on each item in the package when the manager completes the package.

As submittals are received they can be electronically attached to the appropriate records and added to a submittal package for review. The submittal package can be thought of as a transmittal used to send one or multiple submittals on a workflow. The workflow is determined by the project team and can be adjusted by an ePM System Administrator as needed. Although a package could have multiple submittals, the reviewer approves or rejects them individually. As submittals are rejected new versions of the records are created automatically, in order to preserve the history of that document.

WHO USES...

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

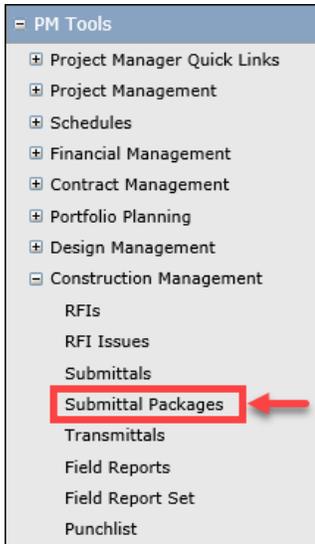
HOW TO...

A. REVIEW A SUBMITTAL PACKAGE

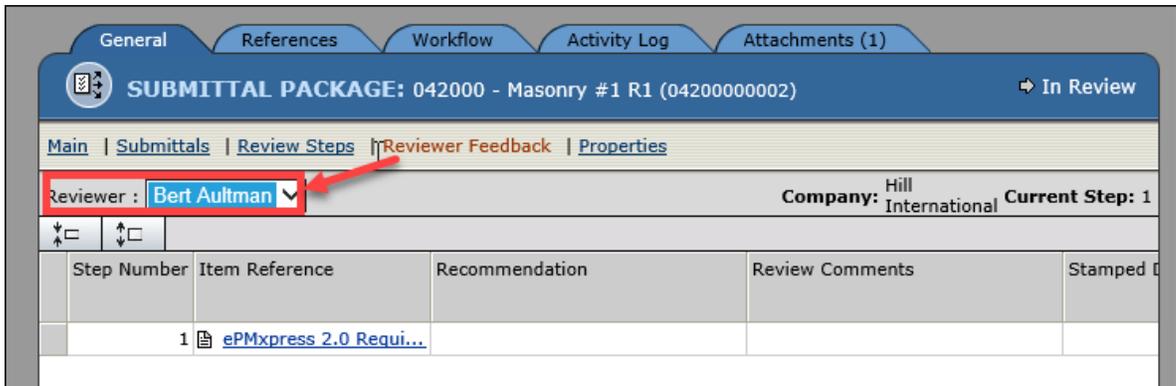
1. Log into ePM as a user with the Submittal Reviewer security role and open the appropriate project. Navigate to the Submittal Package register from the left navigation window (PM Tools/Construction Management/Submittal Packages).

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2. Click the link of the desired Submittal Package. The package will open in Read-Only mode.
3. Click 'Edit', then click the 'Reviewer Feedback' page.
4. Select the Reviewer's name from the Reviewer drop down list.



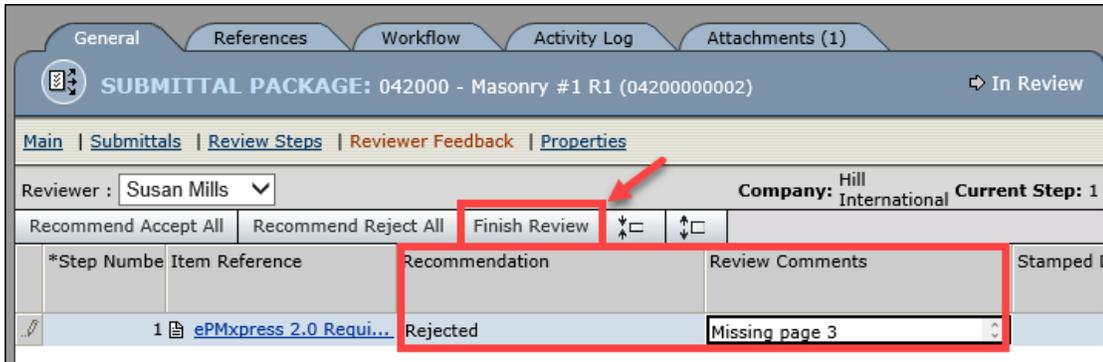
5. Enter feedback and comments about each submittal.

Note: To accept or reject all the submittals at once, just click 'Recommend Accept All' or 'Recommend Reject All'.

6. Click 'Finish Review'.

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Note: If the reviewers were set up in sequence, when the first reviewer clicks 'Finish Review', ePM sends a notice to the second reviewer.

7. When the last person finishes their review, a notice is automatically sent to the Submittal Package Manager.

For instruction on completing submittal packages, see the Quick Reference Guide titled [QRG.016: Submittal Management and Completion](#).

8. When you transition your Submittal Package to the Submitted state, the Submitted Date field will automatically fill in.

REFERENCE

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

- QRG 14 - Submittal Document Creation
- QRG 16 - Submittal Package Management and Completion