

ePM Quick Reference Guide #16

Submittal Package Management & Completion

WHAT IS...

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

The Project Manager and/or Construction Manager will have the opportunity to 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.

Submittals can be 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. 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

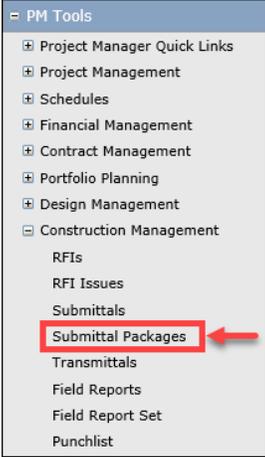
HOW TO...

A. CREATE A SUBMITTAL PACKAGE

1. Log into ePM as a user with the Submittal Reviewer security role, navigate to the appropriate project.
2. Navigate to PM Tools > Construction Management > Submittal Packages to display the Submittal Packages register.

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3. Click 'New' to open a blank Submittal Package document.
4. In the Details section, enter a Title and Package Name for the package. The first segment of the number field is available for Contractor number, the second segment will auto number, and the Revision number will also auto number. In the 'More Details' section, at minimum enter a Due Date for the package.

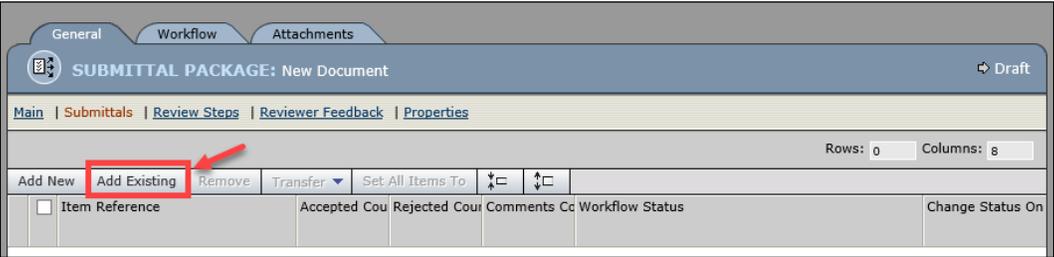
NOTE: The Submitted Date field is populated automatically when the document transitions to the Submitted workflow state.

The screenshot shows the 'SUBMITTAL PACKAGE: New Document' form. The form has tabs for 'General', 'Workflow', and 'Attachments'. The 'General' tab is active. The form is in 'Draft' state. The 'SUMMARY' section shows 'Current State' as 'Draft' and 'Revision Number' as '0'. The 'DETAILS *' section includes fields for 'Current State' (Draft), 'Title *' (04200 - Masonry), 'Number' (a field with a hyphen and a sub-field), 'Package Name *' (04200 Masonry Package 1), 'System Revision Number' (0), and 'Revision Number *' (0). The 'MORE DETAILS' section includes fields for 'Content Provider Contract', 'Manager Contract', 'Submitted Date', 'Actual Completion Date', 'Rejection Date', 'Due Date' (Monday, April 01, 2019), 'Shipping Information', 'Alternate Identifier #1', 'Storage Location', and 'Purpose' (REQ : Required).

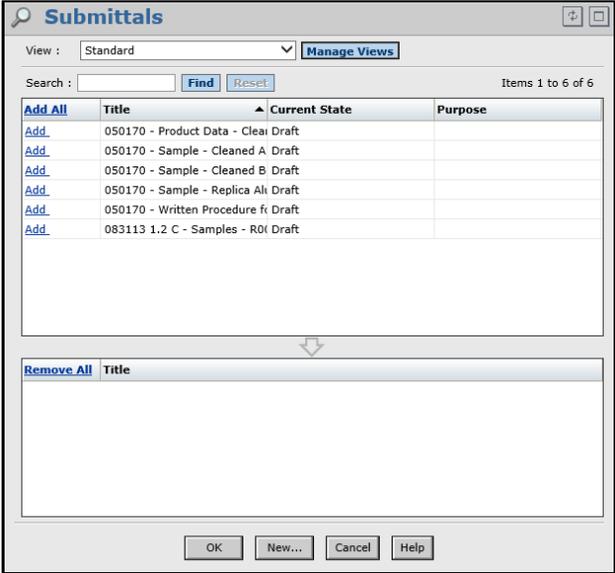
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- 5. Click the 'Submittals' page, then click 'Add Existing' to see a list of available submittals that can be added to the package.



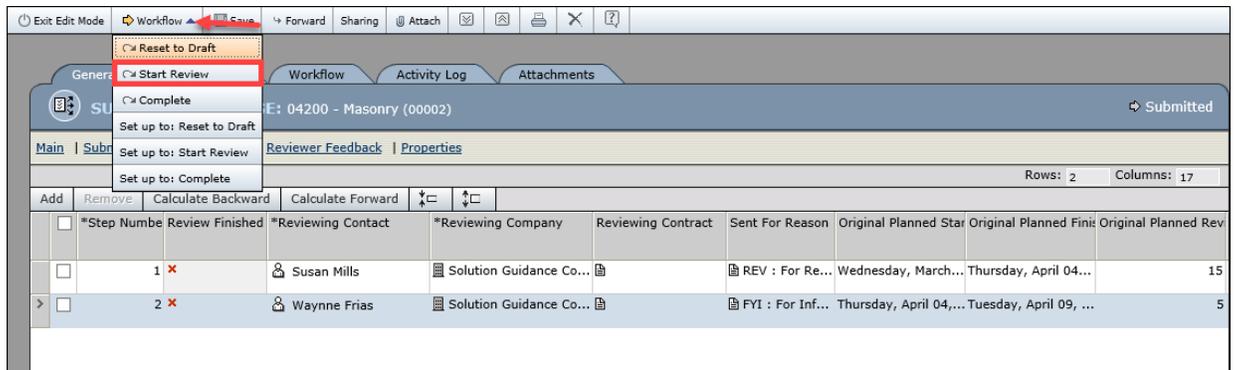
- 6. Select one, multiple, or all submittals to add to the package.



- 7. Click 'Workflow' to submit the package. The workflow dialog box should show at least one user in the To box. If not, use the lookup button to select a user. The recipient must have security permissions that will allow him or her to edit the package in the 'Submitted' state, as well as execute workflow to put the package into Review. Click 'Execute' in the workflow dialog box.

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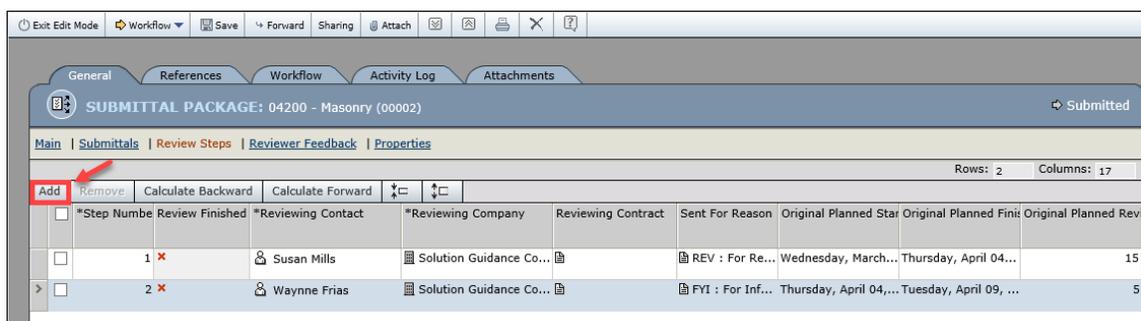
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The Submitted Date field on the main page of the submittal page will auto populate when the package transitions to the submitted workflow state. All submittals in the package will also be updated. The Hcc field will be populated with the adapter that manages the auto-population of the submitted date field.

B. SETTING UP A SUBMITTAL PACKAGE REVIEWERS

1. Log into ePM as a user with the Submittal Manager Security role, then navigate to the appropriate project and to the My Notices register. Click the link for the appropriate package to open the submittal package.
2. In the 'Parties' section, select a contact as Manager who will manage the submittal package. This person is responsible for 'Completing' the package, which will change the state of all the items within the package. This person must have a security role which grants them full permissions to Submittal Packages. This will normally be the Lead Architect. The Source contact is the person responsible for providing the content of the package.
3. Click the 'Submittals' page and confirm that the appropriate individual submittals are included in the package.
4. Click the 'Review Steps' page. Click 'Add' for each reviewer who will receive the submittal package to review. Step Number indicates whether the reviews will be done in sequence or parallel. Number the steps 1, 2, 3, etc. to make the first reviewer to finish before the next reviewer is notified. Number the steps 1, 1, 1, etc to make the reviewers to do their reviews concurrently. Select each reviewer from the 'Contact' lookup list.



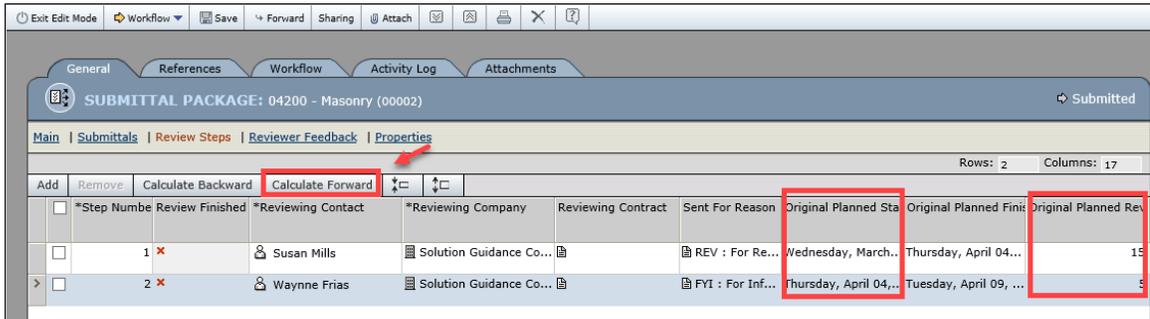
5. In the fields 'Original Planned Start Date', 'Original Planned Finish Date' and 'Original Planned Review Days', enter information in each field, or simply enter an Original Planned Start Date for the first reviewer, then enter Original Planned Review Days for each reviewer, and click

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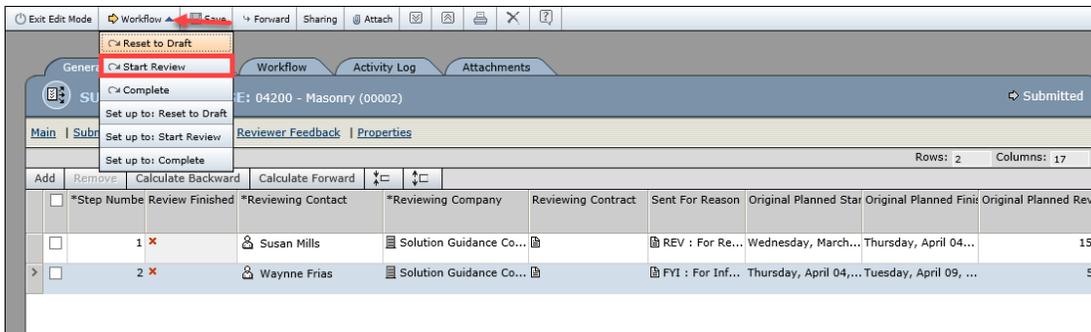
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'Calculate Forward' and ePM will automatically calculate and fill in the start and finish dates for the remaining reviews. Or enter the Original Planned Finish Date for the last reviewer, enter Original Planned Review Days for each reviewer, then click 'Calculate Backward'.



- Execute workflow to 'Start Review'. Notices are sent to the package Manager and Source (the contacts selected in step 8). Also, the first reviewer will receive a notice to begin their review.



For instruction on reviewing submittal packages, see the Quick Reference Guide titled [QRG 015: Submittal Package Review](#).

C. COMPLETING A SUBMITTAL PACKAGE

- Log into ePM as a user with the Submittal Manager role, open the appropriate project, then navigate to the Received Notices page. Find the notice related to completing a submittal package, and click on it to open the package.
- Click on the 'Reviewer Feedback' page to view the comments and recommendations made by each reviewer.
- Click on the Submittals page. The 'Accepted Count', 'Rejected Count' and 'Comments Count' columns show results summaries from the reviews of each submittal in the package. In the 'Change Status on Completion' field, choose either 'Accepted', 'Rejected' or 'Cancelled'. The choice will become the workflow state for the selected submittal.

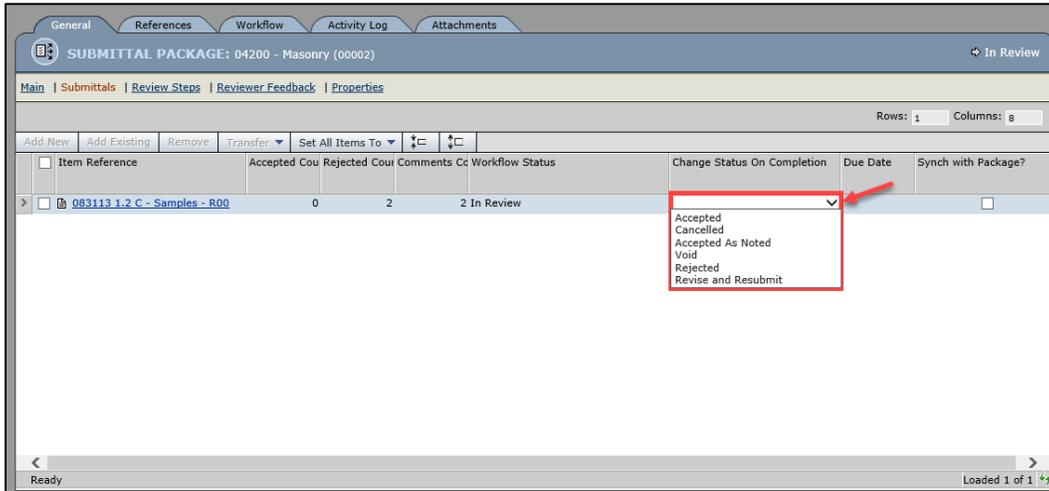
NOTE: If an individual submittal is rejected, upon completion of the package, two things will happen:

- ePM automatically creates a new submittal (in Draft state) with the next revision number, and sets the workflow state of the previous revision to Cancelled.

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- ePM automatically creates a new submittal package with the next revision number



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 15 - Submittal Package Review