

Within the submittal register, click the “add item” button.

Custom Field 1

Custom Field 2

Reviewer

Group By: None | Page: 1 of 7 | Show: 100 per page

Update Status | Forward for Review | Send to Sub | Add to Package | **Add Item**

Item Details	Title	#	Rev #	Package #	Spec Section	Sub Section	Category	Status	Submittal Coordinator	Held By
	Temporary Root Protection Matting - Product Data	1	0	1-01 56 39-0	015639	2.1A	Product Data	2a. Note Mark	Charles Clements	charles.clements2011@gmail.com
	Temporary Trunk/Limb Protection Wrap - Product Data	2	0	2-01 56 39-0	015639	2.1B	Product Data	NEW	Charles Clements	Charles Clements
	Permanent Root Aeration Matting - Product Data	3	0	1-01 56 39-0	015639	2.1C	Product Data	NEW		
	Temporary Tree Protection Fence - Product Data	4	0	1-313146-0	015639	2.1D	Product Data	NEW		

A new screen will prompt you to enter pertinent submittal information such as the name of the item, spec section, and the category.

Add Submittal Item

Details Save & Add New Save

Project	***Mickey Test Project	Status	NEW
* Title	<input type="text"/>	Item Status	
Number		Priority	Please Select...
Description	<input type="text"/>	Revision	
Package	None	Sub Section	<input type="text"/>
* Spec Section		Commitment	Select a commitment...
* Category	Please Select...		
Responsible Sub/Manufacturer	<input type="text"/>		

Then use the drag and drop feature to upload the submittal pdf that will be reviewed.

Documents (0) | Comments (0) | Custom Fields (2) | Revisions (0)

File Name	Attached By	Date Attached
Drag and drop files here to upload, or browse.		

Check the box to the left on the item from the Submittal Register. Then click “Add to Package”

Submittal Register for 17-333 HSF | Replace Emergency Generator Enclosures

Filter Submittal Items

Search In: All Pending my review

Title:

Status:

Number:

Revision:

Submittal Package #: - - Rev

Responsible Sub/Manufacturer:

Custom Field 1:

Custom Field 2:

Item Status: Open Closed Draft Overdue

Description:

Category:

Priority:

Spec Section:

Sub Section:

Submittal Coordinator:

Reviewer:

Group By: None Page: 1 of 1 Show: 100 per page 1 item(s) selected

<input type="checkbox"/>	Item Details	Title	#	Rev #	Package #	Spec Section	Sub Section	Category	Status	Submittal Coordinator	Held By
<input checked="" type="checkbox"/>		 Schedule of Values	1	0		1		Start Up	NEW		
<input type="checkbox"/>		 Submittal Log	2	0		1		Start Up	NEW		
<input type="checkbox"/>		 Lift Plan	3	0		1		Start Up	NEW		

Click the “Create new Submittal Package” Then click “Continue”

Add to Package

Create new submittal package

Select existing submittal package

Fill in the fields shown below. Put the spec section number here. And the same title as the item here. Then Click "Save"

Forms Processes Documents Calendar Contacts Cost Schedule Reports Setup +

Create Submittal Package

Details Save

Project	17-333 HSF I Replace Emergency Generator Enclosures
Submittal Package #	1 - <input type="text"/> - 0
* Submittal Package Name	<input type="text"/>
Description	<input type="text"/>
Trade	<input type="text"/>

Check the box and click "Send for Review".

Submittal Package Details

Submittal Package Overview History

Request Comment Update Dates Generate Transmittal Edit

Project	***Mickey Test Project	Status	Draft
Title	test	Trade	
Description		Created By	Nichols, Lindsay
Submittal Package #	1-313146-0	Baseline Start Range	Baseline Finish Range
Date Created	02.26.2019 9:28 AM		
Items Held By			

Items (1) Documents (0) Comments (0) Custom Fields (0) Revisions (0)

Group By: None Page 1 of 1 Show 10 per page 1 item(s) selected

Send for Review Send to Sub Add Items Remove Items

<input checked="" type="checkbox"/>	Item Details	Title	#	Rev #	Spec Section	Sub Section	Category	Status	Submittal Coordinator	Held By	Reviewers
<input checked="" type="checkbox"/>		Temporary Tree Protection Fence - Product Data	4	0	015639	2.1D	Product Data	NEW			

You will see the AE's name under submittal coordinator and a review complete date. Do not copy others on this submittal. Finally click "Send for Review"

Send for Review

* Submittal Coordinators	Jean Graziano (University of Maryland, Baltimore) ▼	
* Review Complete Due Date	03.18.2019	
CC Roles	<ul style="list-style-type: none">ClientCommissioning AgentConstruction ProfessionalConstruction Trade ContractorCost EstimatorDesign Professional LeadDesign Sub ConsultanteB AdminFire MarshalFM Help Desk	<div style="border: 1px solid gray; height: 100px; width: 100%;"></div>

The AE will receive an email notification that a submittal is in their court, and will download the pdf and mark up the document. The AE will attach a new version into e-Builder, click on the submittal package link to forward it to UMB for review.

Submittal Item Details

Submittal Item Overview		Date Details	History
Project	***Mickey Test Project		
Title	Woven Silt Tube - Product Data		
Number	5		
Description			
Package #	1-00 01 01-0		

The submittal package details screen will appear with a place for the AE to change the e-Builder status to correspond its submittal action listed on the pdf to the e-Builder submittal options (See below). Once the status has been changed, the AE will check the submittal item box and click “Forward for Review”.

Submittal Package Details

Submittal Package Overview History

Request Comment
Generate Transmittal

Project	***Mickey Test Project			Status	Open
Title	Temporary Trunk/Limb Protection Wrap - Product Data			Trade	P&JCON
Description				Created By	Howe, Rebecca
Submittal Package #	2-01 56 39-0				
Date Created	02.11.2016 3:06 PM				
Submittal Coordinator	Charles Clements				
Items Held By	Charles Clements				
Baseline Start Range	03.02.2016 - 03.02.2016			Baseline Finish Range	03.02.2016 - 03.02.2016

Items (1) | Documents (0) | Comments (0) | Custom Fields (0) | Revisions (0)

Group By: None
Page 1 of 1 Show 10 per page

Update Status
Send to Contractor
Forward for Review

Item Details	Title	#	Rev #	Spec Section	Sub Section	Category	Status	Submittal Coordinator	Held By	Reviewers
	Temporary Trunk/Limb Protection Wrap - Product Data	2	0	015639	2.1B	Product Data	NEW	Charles Clements	Charles Clements	Reviewers

Description	Prefix	Req. Rev	For Rec. Only	Auto-Close Status
1. No Exceptions Taken	Submission appears to comply with CD's. Work can proceed.	NET		
2a. Note Markings/Attachments	Submission will appear to comply with CD's when noted comments are incorporated. Work can then proceed.	NMA		
2b. Note Markings/Resubmit for Record	Submission will appear to comply with CD's when noted comments are incorporated. Work can then proceed. Resubmit corrected copy.	RFR	✓	
3. Amend & Resubmit	Submission has deficiencies which cannot be easily field corrected and does not comply with CD's. Work cannot proceed. Amend & Resubmit.	A&R	✓	
4. Rejected/Resubmit	Submission has fundamental deficiencies and does not comply with CD's. Work cannot proceed. Resubmit.	REJ	✓	
5. Received, No Action Required	Used for submittals which do not require review	NAR		✓

The submittal package details screen will appear with a place for the UMB PM to check the submittal item box and click “Forward for Review” to send to clients, UMB Reviewers, Fire Marshall, etc.

Submittal Package Details

Submittal Package Overview History

Request Comment Generate Transmittal

Project	***Mickey Test Project	Status	Open
Title	Temporary Trunk/Limb Protection Wrap - Product Data	Trade	P&JCON
Description		Created By	Howe, Rebecca
Submittal Package #	2-01 56 39-0	Baseline Finish Range	03.02.2016 - 03.02.2016
Date Created	02.11.2016 3:06 PM		
Submittal Coordinator	Charles Clements		
Items Held By	Charles Clements		
Baseline Start Range	03.02.2016 - 03.02.2016		

Items (1) Documents (0) Comments (0) Custom Fields (0) Revisions (0)

Group By: None Page 1 of 1 Show 10 per page Update Status Send to Contractor Forward for Review

Item Details	Title	#	Rev #	Spec Section	Sub Section	Category	Status	Submittal Coordinator	Held By	Reviewers
	Temporary Trunk/Limb Protection Wrap - Product Data	2	0	015639	2.1B	Product Data	NEW	Charles Clements	Charles Clements	Reviewers

The individuals will receive the submittal, download the pdf, make comments, and upload a new version. Then they will click the “Review Complete” button to send the submittal back to the UMB PM.

When the submittal finally gets back to the AE, they will go into the submittal package and click the “Send to Contactor” button to return the submittal back to the Contractor to close. The AE must make sure the final submittal action stamps in e-Builder and in the pdf correspond. If an e-Builder status requires a revision, you will not be able to close out the submittal.

In order to create a revision, the contractor will need to click the “Create Revision” button. Then proceed to follow the steps above.