

Vendor

Submitting a Submittal

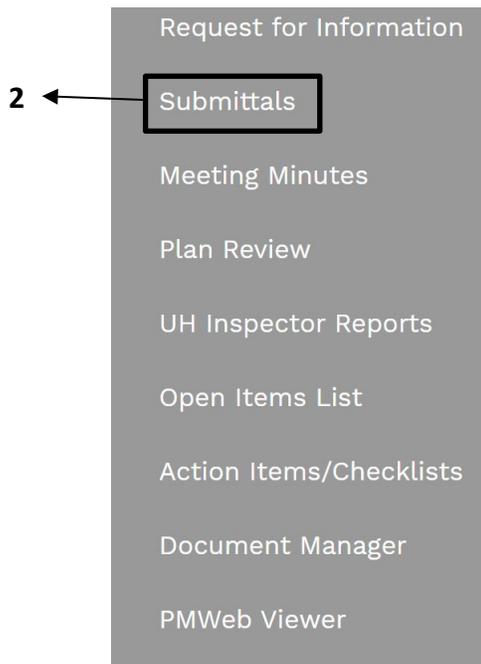
Overview: This guide explains the process for vendors to submit submittals, shop drawings and other documents for review.

Reference: Project plans and specifications.

1- Click on **ENGINEERING FORMS** from the buttons on the left.



2- Under Engineering Forms, select **Submittals**.

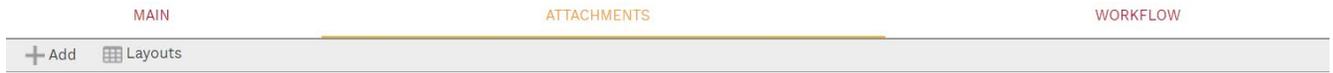


- 3- Click on  the '+' to create a new record.
- 4- **Project** field - Select the project from the Project drop down menu or type in the name of the project.
- 5- **Submittal Type** field – Under the drop down menu, select the appropriate document type.
- 6- **Set #** field – Defaults to the next sequential number. Edit to reflect vendor set number.
- 7- **Description** field – Add a description of the submittal set.
- 8- **Status** field – Reflects current status.
- 9- **Date** field – Optional field for vendor use. Note, workflow dates within PM Web will be official dates.
- 10- **Specification** field – Select the appropriate specification section from the drop down menu. Select 'N/A' if the document is not associated with a specification section.
- 11- On the top bar, click on the  icon to save the header.

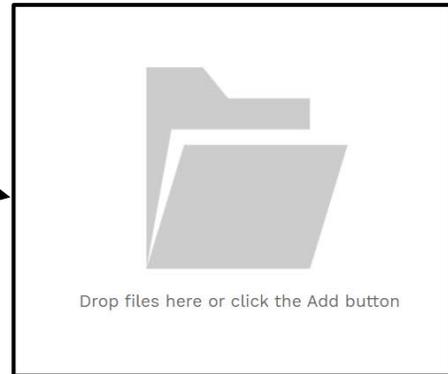


Project*		4	▼
Submittal Type		5	▼
Set #*		6	
Description		7	
Status / Revision		Draft 8	▼
Date		9	
Specification		10	▼

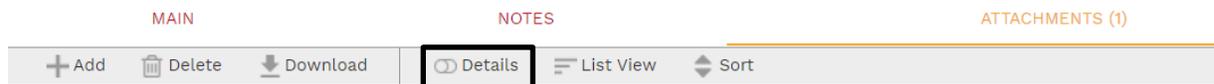
- 12- To add submittals and submittal set cover sheet, select the '**Attachments**' tab at the top.
- 13- Add attachments by dragging them to the 'Drop files here' section.



13



- 14- The description field autofills with the file name. Edit the description field to only include the submittal description.
- 15- Click on **Details** to show the details for attachments.



15

16- Review attachment details. Click on the 'Edit' icon to make edits

17- In the description field, provide a brief description of the attachment. Add notes or comments if needed.

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 **16** 

Description* **17**

Linked Line

Notes

Geolocation

Version 1

Added From Upload

Added 01-02-2023

Added By Vendor - Vendor

18- Click on the save icon.

19- Repeat the process for additional back up files.

20- Click the **Save** icon.

21- A submittal set cover sheet shall also be included as an attachment

22- Additional submittals within the same specification section can be added by repeating previous.

23- When all attachments have been uploaded, select the **'Workflow'** tab at the bottom.

24- Click on the **Submit** button in the 'Actions' box.

25- Add any desired comments to the "Comments" box.



26- Click on  **SAVE** the button in the 'Actions' box.

27- Process Complete

Standard submittal file naming format:

