

e-Builder Submittals

Slides 2 – 3: Diagrams

Slides 4 – 13: Setup Register

Slides 13 – 29: Create Package

Slides 30 – 39: Send for Review & Return

Slides 40 – 44: Revisions

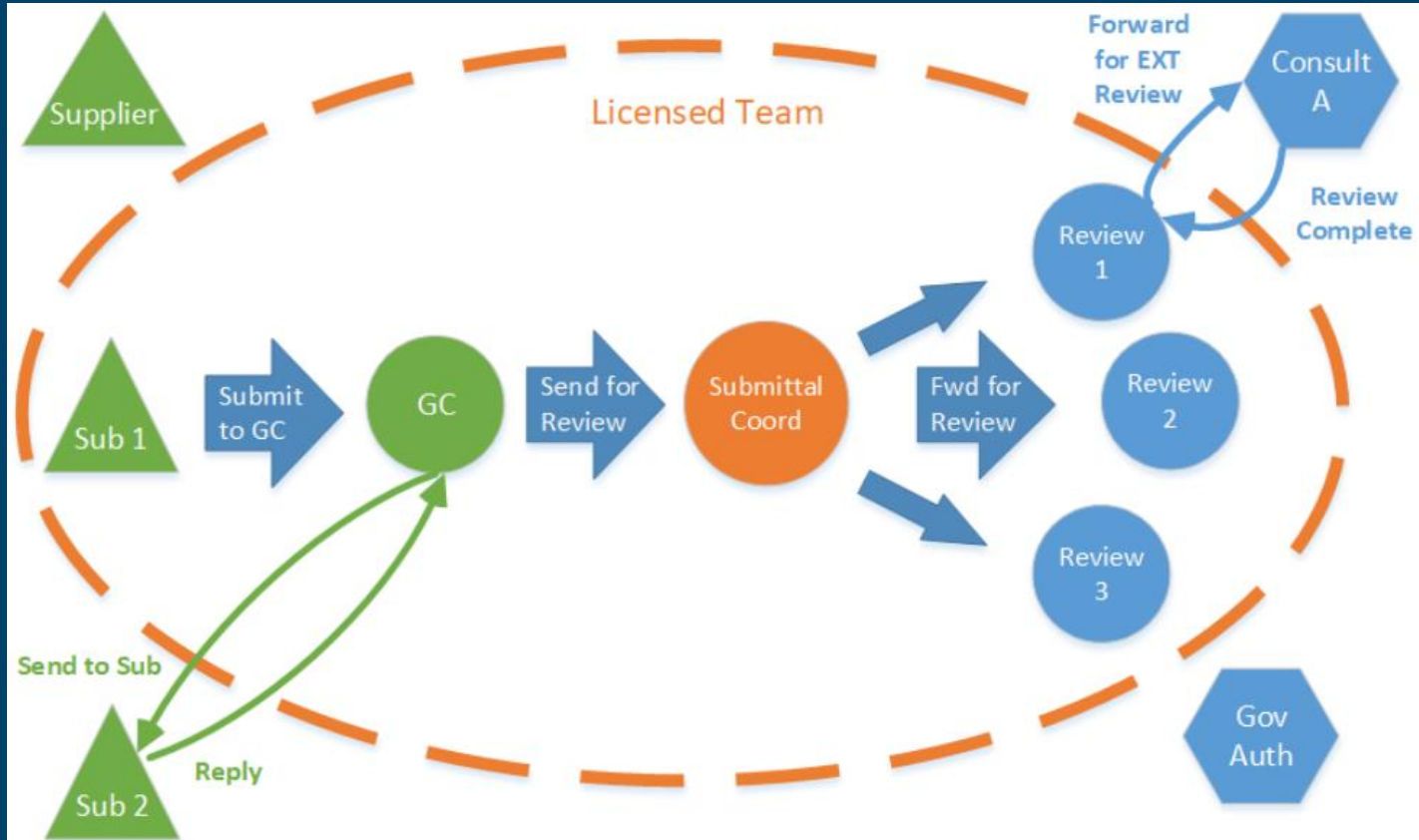
Slides 45-47: Acknowledge Return

Slide 48: View Closed Submittals

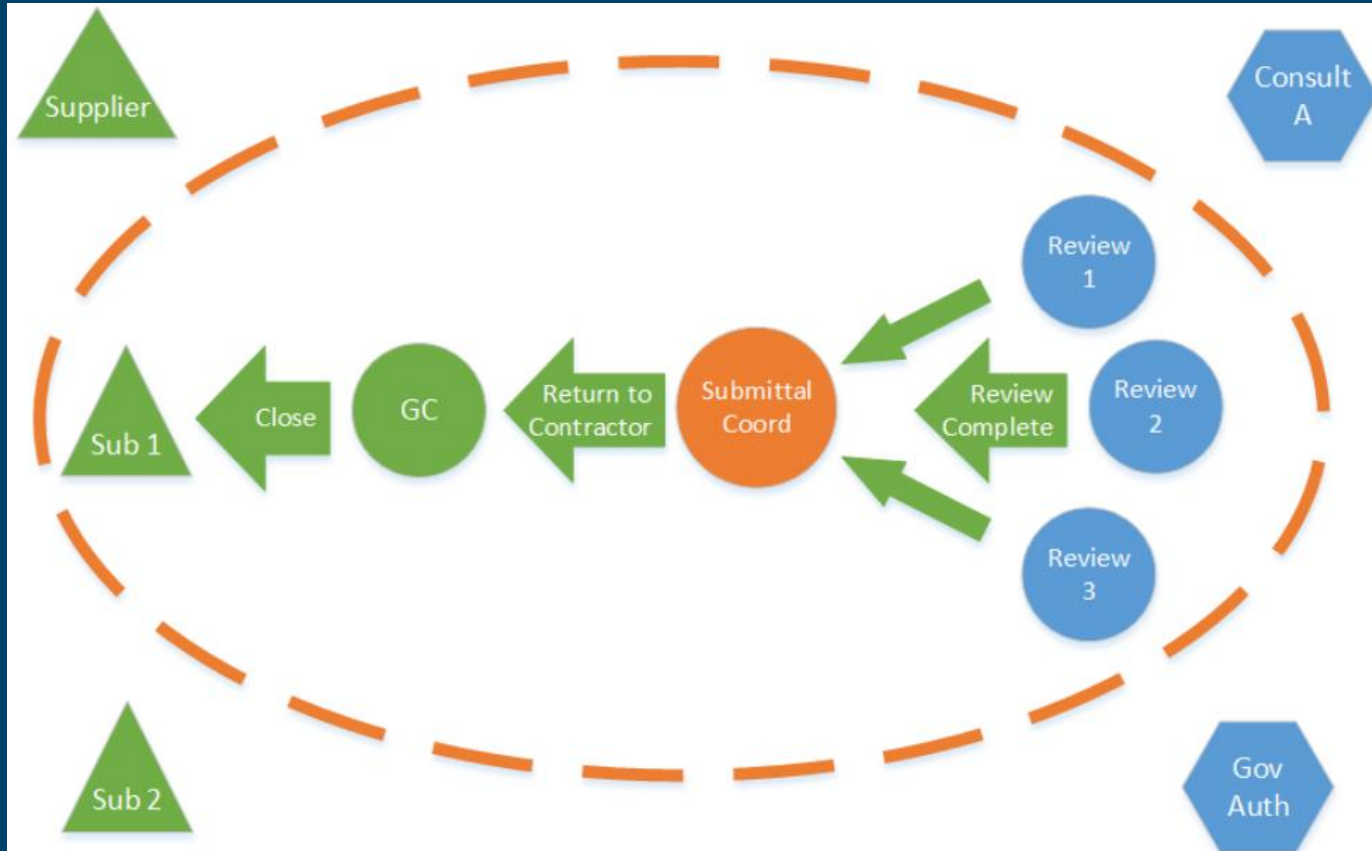


October 21, 2021

Submittals – Forward



Submittals - Return





Submittals - Setup

Coordinator should
be Consultant or
A/E

Project: Marsh Creek Park Operations Center
Complete Review Date Due Offset:
Offset Type: Calendar Days
 Working Days
Specify Default Folder For Attachments: [Select Folder]
* Submittal Coordinator:

Who to Notify: ?

Notify Submittal Coordinator on Review Complete: ?

Project: Marsh Creek Park Operations Center

Calendar Days

Working Days

[Select Folder]

Select From:

Alex Shapiro
e-Builder Implementation
Kelly Ham
Paul Stewart
Peter Sherman
Priscilla Williams
Santhosh Mahavadi
Veronica High

Roles

Administrative Support
Assistant Engineering Services [...]
Business Manager
Business Supervisor
Communications Specialist
Construction Project Coordinat
Contracts Administrator
eB Super User
eB System Admin

No items in review

Peter Upchurch



Raleigh

Submittals - Setup

Optional Settings

Submittal Package Options

Use CSI List:	<input type="text" value="Yes"/>
CSI List to Use:	<input type="text" value="CSI MasterFormat 2012"/>
Submittal Item Spec Section Populated by CSI Code:	<input type="checkbox"/>
Auto Numbering Packages:	<input type="radio"/> Per Code <input checked="" type="radio"/> Per Project
Honor Auto-Close Status:	<input checked="" type="checkbox"/>
Allow items to be added after review starts:	<input type="checkbox"/>
Allow revision items to be added to existing packages:	<input type="checkbox"/>

Subcontractor Options

General Contractors for Submission:	<input type="text" value="- Select Role -"/>
GC Review Complete Due Date Offset:	<input type="text"/>
Offset Type:	<input checked="" type="radio"/> Calendar Days <input type="radio"/> Working Days



Raleigh

Submittals - Register




Ignore Filter
Submittal Items,
that's just for
searching

Submittal Register for Marsh Creek Park Operations Center

Filter Submittal Items

Search In	<input checked="" type="radio"/> All <input type="radio"/> Pending my review	Item Status	<input checked="" type="checkbox"/> Open <input type="checkbox"/> Closed <input checked="" type="checkbox"/> Draft <input type="checkbox"/>
Title	<input type="text"/>	Description	<input type="text"/>
Status	<input type="text" value="Please select a status..."/>	Category	<input type="text" value="Please select a category..."/>
Number	<input type="text"/>	Priority	<input type="text" value="Please select..."/>
Revision	<input type="text"/>	Spec Section	<input type="text"/>
Submittal Package #	<input type="text"/> - <input type="text"/>	Sub Section	<input type="text"/>
	- Rev <input type="text"/>	Submittal Coordinator	<input type="text" value="Please select..."/>
Responsible Sub/Manufacturer	<input type="text"/>	Reviewer	<input type="text"/>
Custom Field 1	<input type="text" value="Please select a"/> <input type="text"/>		
Custom Field 2	<input type="text" value="Please select a"/> <input type="text"/>		

Group By Page of 1 Show per page

<input type="checkbox"/>	Item Details	Title	#	Rev #	Package #	Spec Section	Sub Section	Category	Status	Submittal Coordinator	Held By	Reviewers
<input type="checkbox"/>	  	<i>Project Schedule</i>	1	0		13100		<i>Progress Schedule</i>	NEW			



Raleigh

Submittals - Register

Manually add
Submittal Register
item

Import an excel
sheet of the
register

The screenshot shows a toolbar with four buttons: 'Add to Package', 'Add Item', 'Delete', and 'Import'. Below the toolbar is a table with a header row containing the word 'Reviewers'. The table body is currently empty.

Reviewers



Raleigh

Submittals - Register

Manually add
Submittal Register
item – not
commonly used

Add Submittal Item

Details

Save & Add New Save Cancel

Project	z_2021_Test_Project_2	Project Number	23
* Title	<input type="text" value="Steel Beams"/>	Status	NEW
Number	<input type="text"/>	Item Status	
Description	<input type="text" value="541"/>	Priority	<input type="text" value="Normal"/>
Package	<input type="text" value="None"/>	Revision	
Spec Section	<input type="text" value="5-4-1"/>	Sub Section	<input type="text"/>
* Category	<input type="text" value="Certification"/>	Commitment	<input type="text" value="Select a commitment..."/>
Responsible Sub/Manufacturer	<input type="text"/>		

Date Details

Target	Actual
Date Due From Subcontractor ?	Date Received From Subcontractor ?
Submit For Review Due Date ?	Date Submitted For Review ?
Review Complete Due Date ?	Date Review Completed ?
Consultant Respond By Date ?	Consultant Review Complete Date ?
Return Due Date ?	Date Returned ?
Delivery Due Date ?	Date Delivered ?
GC Complete Review Due Date ?	Date Sent to Subcontractor ?
	Date Sent to GC ?



Raleigh

Submittals - Register

Import Submittal
Items

Import Submittal Register for z_2021_Test_Project_2 - Select Import File

Step 1 of 3

Choose your Import File

* Import File:

Choose File

No file chosen

Note: Please select a .xls or
.xlsx file to import.

Next



Raleigh

Submittals - Register

Import Submittal
Items

[Submittal Register Import](#) <- Link

Three required fields:

1. Submittal Title
2. Spec Section
3. Category
 1. MUST MATCH existing e-builder category
(we can add to these)
4. Package Name is recommended, but the GC can assign them to packages later

Submittal Title	Spec Section	Sub Section	Category
Submittal/Product Title	01 56 39 - TEMPORARY TREE AND PLANT PROTECTION	001	Material Data/Product Literature
Sample Title	01 56 39 - TEMPORARY TREE AND PLANT PROTECTION - ORGANIC MULCH SAMPLE	002	Sample
Submittal/Product Title	01 56 39 - TEMPORARY TREE AND PLANT PROTECTION - TREE PRUNING SCHEDULE	003	Progress Schedule
Shop Drawing Title	03 10 00 - FORMWORK - INSTALLATION INSTRUCTIONS	001	Shop Drawing



Submittal Item Built-In Fields

* Title:	<input type="text" value="Submittal Title"/>	* Category:	<input type="text" value="Category"/>
Description:	<input type="text" value="Description"/>	Priority:	<input type="text" value="Priority"/>
Package Number:	<input type="text"/>	Package Name:	<input type="text" value="Package Name"/>
Spec Section:	<input type="text" value="Spec Section"/>	Sub Section:	<input type="text" value="Sub Section"/>
Responsible Manufacturer/Sub- Contractor:	<input type="text" value="Responsible Manufacturer/Sub-Cc"/>	Commitment:	<input type="text"/>
Date Due From Sub:	<input type="text" value="Date Due From Sub"/>	Date Received From Sub:	<input type="text" value="Date Received From Sub"/>
Date Due Submit For Review:	<input type="text" value="Date Due Submit For Review"/>	Date Due Review Complete:	<input type="text" value="Date Due Review Complete"/>
Date Due Return:	<input type="text" value="Date Due Return"/>	Date Returned:	<input type="text" value="Date Returned"/>
Date Due Delivery:	<input type="text" value="Date Due Delivery"/>	Date Delivered:	<input type="text" value="Date Delivered"/>
Date Submitted For Review:	<input type="text"/>	Date Review Completed:	<input type="text"/>
Consultant Review Complete Date:	<input type="text"/>		

Submittal Item Custom Fields

There are no submittal item custom fields.



Raleigh

Submittals - Register

Import Submittal Items – Step 3

Import Submittal Register for z_2021_Test_Project_2 - Review

Step 3 of 3

Import File Summary

Previous

Import

Cancel

File Name:	Copy of Submittal Register Template_Brentwood.xlsx	Rows In File:	194
Rows To Be Imported:	194	Rows With Exceptions:	0

Preview (Row 39)

Exceptions (0)

Submittal Item Built-In Fields







Title:	Warranty Title	Category:	Warranties and Guarantees
Description:	Warranty Start & End Date (MM/DD/YYYY - MM/DD/YYYY)	Priority:	Normal
Package Number:		Package Name:	
Spec Section:	07 61 10 - SHEET METAL ROOFING - WARRANTIES	Sub Section:	005
Responsible Sub/Manufacturer:		Commitment:	
Date Due From Sub:		Date Received From Sub:	
Date Due Submit For Review:		Date Due Review Complete:	
Date Due Return:		Date Returned:	
Date Due Delivery:		Date Delivered:	
Date Submitted For Review:		Date Review Completed:	



Submittals - After Import

Brown italic text means it's a Draft and not in a Package.
At this point, the contractor or consultant/A/E will take over for placing items in packages and sending for reviews.

Group By Page of 2 Show per page

<input type="checkbox"/>	Item Details	Title	#	Rev #	Package #	Spec Section	Sub Section	Category	Status	Submittal Coordinator	Held By	Reviewers
<input type="checkbox"/>	  	<i>Submittal/Product Title</i>	1	0		<i>01 56 39 - TEMPORARY TREE AND PLANT PROTECTION</i>	001	<i>Material Data/Product Literature</i>	<i>NEW</i>			
<input type="checkbox"/>	  	<i>Sample Title</i>	2	0		<i>01 56 39 - TEMPORARY TREE AND PLANT PROTECTION - ORGANIC MULCH SAMPLE</i>	002	<i>Sample</i>	<i>NEW</i>			



Submittal Packages

1. Create Package
2. Add registry items to package
3. Send individual items or entire package for review
 1. If needed, forward to additional reviewers
4. Receive items/package back and acknowledge or create a revision

(Steps shown on following slides)



Submittals - Packages

Click Submittal Packages

Click Create Package

- Schedule
- Cost
- Contacts
- Calendar
- Submittals**
 - Submittal Register
 - Submittal Packages
 - Update Dates
 - Settings

Page 1 of Show 100 per page

<input type="checkbox"/>	Title	Description	Package #	Date Created	Last Modified Date	Sent for Review	Held By
There are no Submittal Packages.							

Create Package



Submittals - Packages

The CSI List (dropdown shown here) can be used, or you can type in a custom number and name

Create Submittal Package

Details

Save

Cancel

Project z_2021_Test_Project_2

Project Number 23

Submittal Package # 1 - - 0

* Submittal Package Name	<input type="text" value=""/>	00 00 00 - PROCUREMENT AND CONTRACTING REQUIREMENTS	<input type="text" value=""/>
Description	<input type="text" value=""/>	00 10 00 - SOLICITATION	<input type="text" value=""/>
Trade	<input type="text" value=""/>	00 20 00 - INSTRUCTIONS FOR PROCUREMENT	<input type="text" value=""/>
		00 30 00 - AVAILABLE INFORMATION	<input type="text" value=""/>
		00 40 00 - PROCUREMENT FORMS AND SUPPLEMENTS	<input type="text" value=""/>
		00 50 00 - CONTRACTING FORMS AND SUPPLEMENTS	<input type="text" value=""/>

Custom Fields



Submittals - Packages

Example of a filled out package:

Create Submittal Package

Details

Save

Cancel

Project

z_2021_Test_Project_2

Project Number

23

Submittal Package #

1 - - 0

* Submittal Package Name

Fire Code Deliverable

Description

Trade

Safety

Submittal – Packages – Add Items

Submittal Package Overview **History**

[Request Comment](#) [Update Dates](#) [Generate Transmittal](#) [Delete](#) [Edit](#)

Project Title	z_2021_Test_Project_2	Project Number	23
Description	Fire Code Deliverable	Status	Draft
Submittal Package #	1-0-0	Trade	Safety
Date Created	03.11.2021 2:47 PM	Created By	Sherman, Peter
Items Held By		Baseline Finish Range	
Baseline Start Range			

[Items \(0\)](#) [Documents \(0\)](#) [Comments \(0\)](#) [Custom Fields \(0\)](#) [Revisions \(0\)](#)

Group By Page of Show per page

[Add Items](#) [Remove Items](#)

<input type="checkbox"/>	Item Details	Title	#	Rev #	Spec Section	Sub Section	Category	Status	Submittal Coordinator	Held By	Reviewers
--------------------------	--------------	-------	---	-------	--------------	-------------	----------	--------	-----------------------	---------	-----------

There are no submittal items in this package

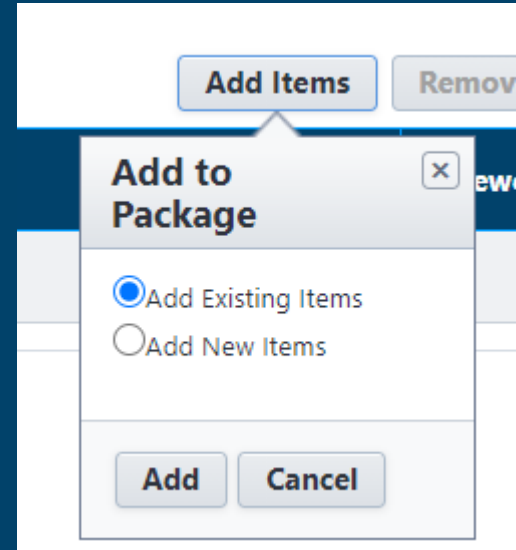


Raleigh

Submittals – Packages – Add Items

Use Add Existing Items for Submittal Register items that have already been loaded into your project.

Use Add New Items for items not in the register, or if it was not loaded.





Submittals – Packages – Add Items

Filter Submittal Items

Description:	<input type="text"/>	Category:	<input type="text" value="Please select a category..."/>
Title:	<input type="text"/>	Spec Section:	<input type="text"/>
Number:	<input type="text"/>	Sub Section:	<input type="text"/>
Responsible Sub/Manufacturer:	<input type="text"/>	Priority:	<input type="text" value="Please select..."/>
Custom Field 1:	<input type="text" value="Please select a custom field..."/>	Custom Field 2:	<input type="text" value="Please select a custom field..."/>
	<input type="text"/>		<input type="text"/>

Group By: Page of 2 Show per page 2 item(s) selected

<input type="checkbox"/>	Title	#	Spec Section	Sub Section	Category	Status
<input checked="" type="checkbox"/>	Submittal/Product Title	1	01 56 39 - TEMPORARY TREE AND PLANT PROTECTION	001	Material Data/Product Literature	NEW
<input checked="" type="checkbox"/>	Sample Title	2	01 56 39 - TEMPORARY TREE AND PLANT PROTECTION - ORGANIC MULCH SAMPLE	002	Sample	NEW



Submittals – Packages

The register items have been added to the package. However, there are still no attachments (look at the paperclip)

Click the paperclip to add attachments, if needed

Submittal Package Details

Submittal Package Overview

History

Request Comment

Update Dates

Generate Transmittal

Edit

Project Title	z_2021_Test_Project_2 Fire Code Deliverable	Project Number	23
Description		Status	Draft
Submittal Package #	1-0-0	Trade	Safety
Date Created	03.11.2021 2:47 PM	Created By	Sherman, Peter
Items Held By		Baseline Finish Range	
Baseline Start Range			

Items (2)

Documents (0)

Comments (0)

Custom Fields (0)

Revisions (0)

Group By

Page of 1 Show per page







Send for Review

Submit to GC

Send to Sub

Add Items

Remove Items

<input type="checkbox"/>	Item Details	Title	#	Rev #	Spec Section	Sub Section	Category	Status	Submittal Coordinator	Held By	Reviewers
<input type="checkbox"/>	  	Submittal/Product Title	1	0	01 56 39 - TEMPORARY TREE AND PLANT PROTECTION	001	Material Data/Product Literature	NEW			
<input type="checkbox"/>	  	Sample Title	2	0	01 56 39 - TEMPORARY TREE AND PLANT PROTECTION - ORGANIC MULCH	002	Sample	NEW			



Submittals – Packages

Click Add

Attached Documents - Submittal/Product Title - #1

File Name	Attached By
There are no documents attached to this submittal item.	

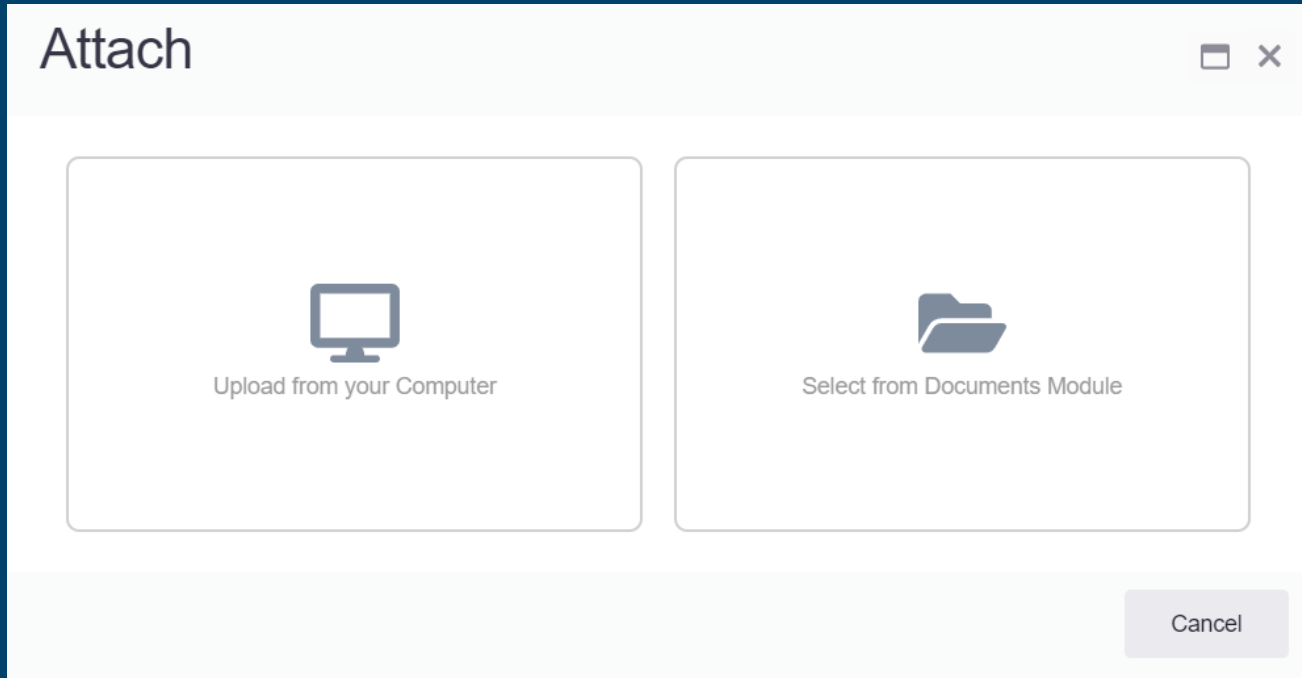
Add

Cancel



Submittals – Packages

This is the standard attachment window for e-Builder. Use “Upload from your Computer” unless the document is already in your project.



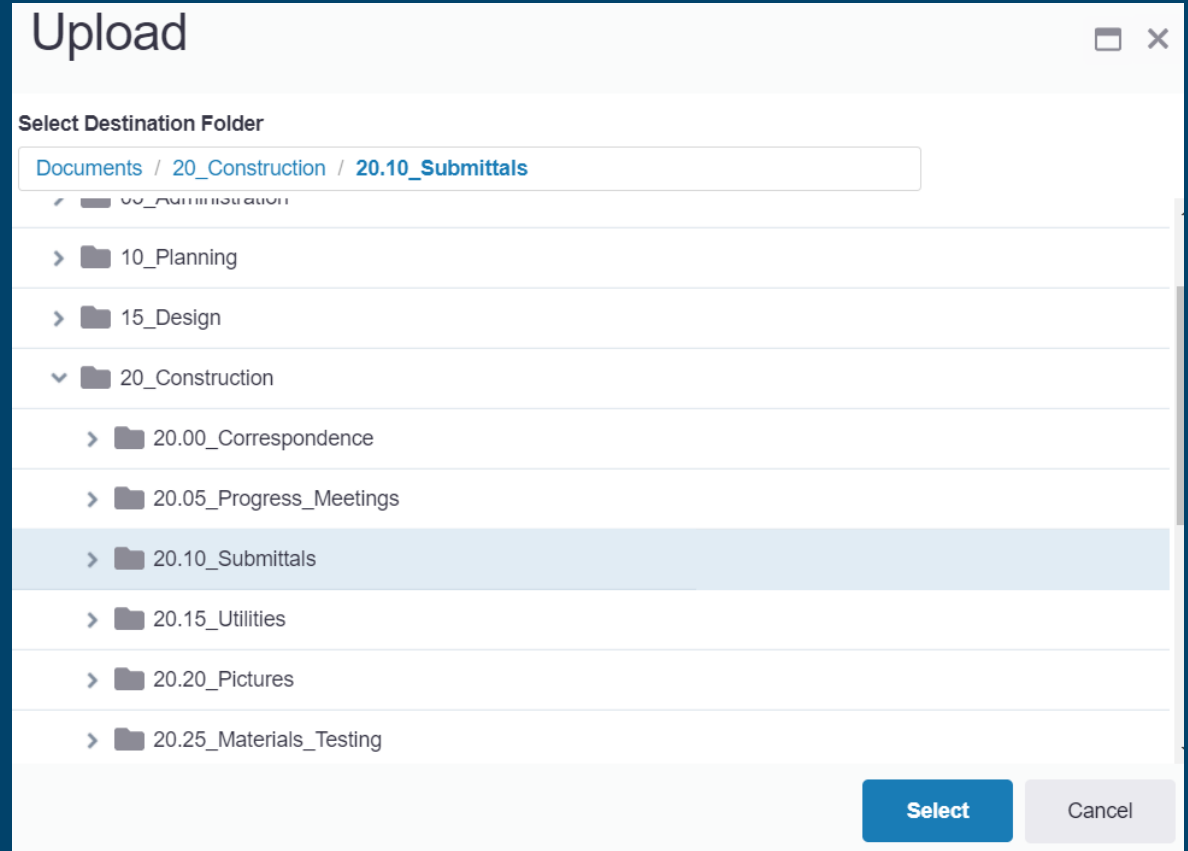


Raleigh

Submittals – Packages

Upload from your Computer – before you can upload, you must select where in your project the file will live.

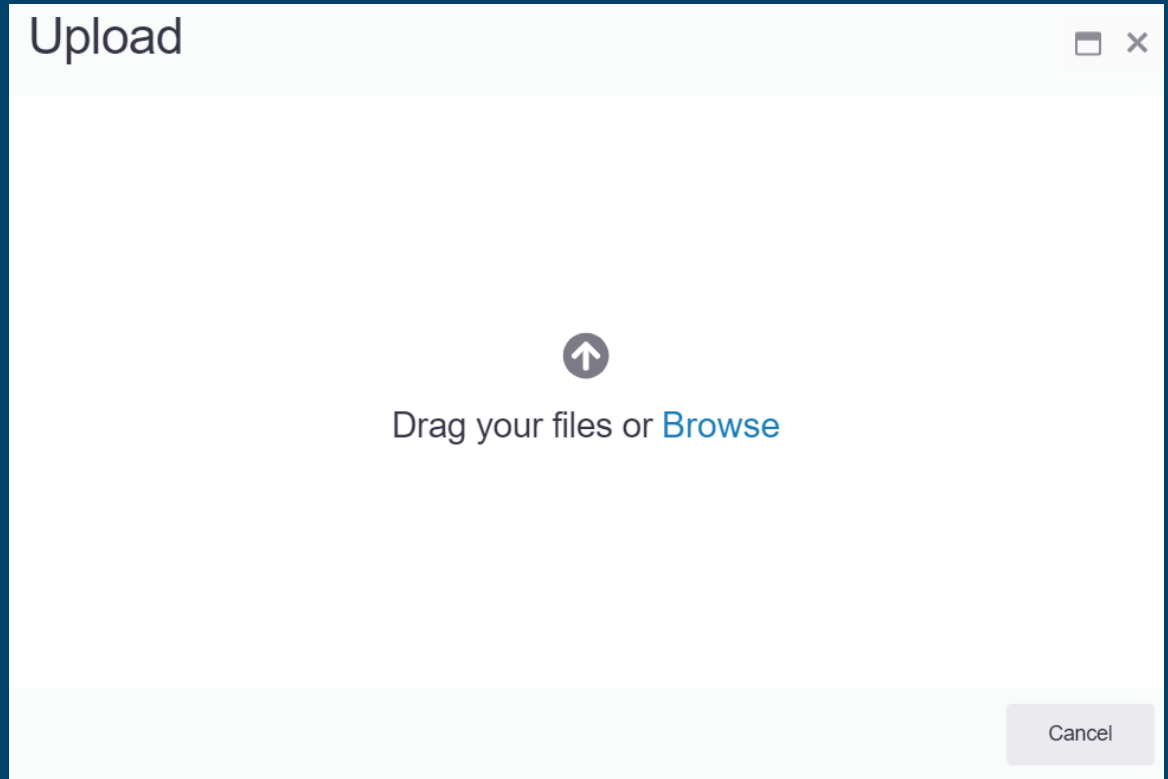
This is the same for uploading any file to any part of e-Builder.





Submittals – Packages

Upload from your Computer – Now you can click here to browse to your files, or if you already have the folder open on your computer you can click and drag







Raleigh

Submittals – Packages

Upload from your
Computer – Successful
Upload. The
Description is optional.

Upload

1 of 1 files uploaded successfully

	20.10_Submittals 100% of 205 KB uploaded	✓
	2017_FEMA_Schedule_of...ent_Rates_508_FINAL.pdf Uploaded successfully	✓

Properties for all files
Select a file to apply properties to just that file.

Description

Drag & drop files here or [browse](#)

Done



Submittals – Packages

Press Cancel to go back to the package screen. The file is now attached to that register item.

Planning

Forms

Items Held By

Baseline Start Range

Baseline Finish Range

Attached Documents - Submittal/Product Title - #1

<input type="checkbox"/>	File Name	Attached By
<input type="checkbox"/>	2017_FEMA_Schedule_of_Equipment_Rates_508_FINAL.pdf (version 1) Properties Download (209.8KB) Redline Stamp Remove	Sherman, Peter

Submittals

Submittal Register

Submittal Packages

<input type="checkbox"/>		Submittal/Product Title	1	0	01 56 39 - TEMPORARY TREE AND PLANT PROTECTION	001	Material Data/Product Literature	NEW
--------------------------	--	-------------------------	---	---	--	-----	----------------------------------	-----





Submittals – Packages

The number here shows how many attachments there are

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

Group By: Page: of 1 Show: per page

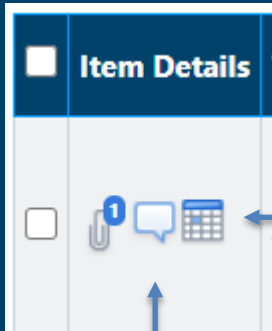
<input type="checkbox"/>	Item Details	Title	#	Rev #	Spec Section	Sub Section	Category	Status	Submittal Coordinator	Held By	Reviewers
<input type="checkbox"/>		Submittal/Product Title	1	0	01 56 39 - TEMPORARY TREE AND PLANT PROTECTION	001	Material Data/Product Literature	NEW			
<input type="checkbox"/>		Sample Title	2	0	01 56 39 - TEMPORARY TREE AND PLANT PROTECTION - ORGANIC MULCH SAMPLE	002	Sample	NEW			





Submittals – Packages

The other icons are also clickable menu options.



Change the Due Dates
for this item

Add a comment for this
package item



Submittals – Send for Review – Within Package

As GC, send to Consultant or A/E

Submit to GC– as Consultant, send to GC

Send to Sub – send to not-in-e-Builder subcontractor

Select items to send

Group By Page of 1 Show per page 2 item(s) selected

<input checked="" type="checkbox"/>	Item Details	Title	#	Rev #	Spec Section	Sub Section	Category	Status	Submittal Coordinator	Held By	Reviewers
<input checked="" type="checkbox"/>		Submittal/Product Title	1	0	01 56 39 - TEMPORARY TREE AND PLANT PROTECTION	001	Material Data/Product Literature	NEW			
<input checked="" type="checkbox"/>		Sample Title	2	0	01 56 39 - TEMPORARY TREE AND PLANT PROTECTION - ORGANIC MULCH SAMPLE	002	Sample	NEW			



Submittals – Send for Review – Entire Package

Alternatively, if you want to send the entire package then back out to the Packages menu and send from there:

Click Send for Review

Click checkbox next to package

Page 1 of 1 Show 10 per page

[Create Package](#) [Send for Review](#)

<input type="checkbox"/>	Title	Description	Package #	Date Created	Last Modified Date	Sent for Review	Held By	Trade	Status
<input type="checkbox"/>	Fire Code Deliverable - resubmit		1-0-1	03.22.2021	03.22.2021		Sai Sudhni	Safety	Draft
<input checked="" type="checkbox"/>	GC Procurement Forms		7-00 40 00-0	10.22.2021	10.22.2021			PROCUREMENT FORMS AND SUPPLEMENTS	Draft

Here's what it looks like after it's sent. Note the Sent for Review check mark and Held By user

Package #	Date Created	Last Modified Date	Sent for Review	Held By	Trade	Status
1-0-1	03.22.2021	03.22.2021		Sai Sudhni	Safety	Draft
7-00 40 00-0	10.22.2021	10.22.2021	<input checked="" type="checkbox"/>	Peter Sherman	PROCUREMENT FORMS AND SUPPLEMENTS	Open



Submittals – Send for Review

* Submittal Coordinators

* Review Complete Due Date

CC Roles

eB Super User
 eB System Admin
 Engineer Manager
 Engineering Project Administrator
 Ext - Consultant Engineering
 Ext - General Contractor
 Ext - Materials Testing
 Inspector - Ext
 Inspector - Int
 Inspector Manager

CC Users

Implementation, e-Builder (e-Builder, Inc.)

CC External Users Via Email

[Select folder]

Peter Sherman
919-996-2521

Private

Selected submittal items

Title	#	Package	Status
Submittal/Product Title	1	1-0-0	NEW
Sample Title	2	1-0-0	NEW



Submittals – Send to GC

Same as previous screen, just selects the GC on the project instead of the submittal coordinator.
If this is not showing up correctly, then the Submittal settings need to be adjusted for your project.


Submit to GC

Submit to GC Cancel

* General Contractor

Sai Sudhni (City of Raleigh) ▼

* GC Review Complete Due Date

03.22.2021 



Enter email

Submittals – Send to Sub

Make sure to select a
folder for their
attachments

Project z_2021_Test_Project_2
Project Number 23
* Send To --Select a Role (Optional)--
--Select Recipient--
or Enter One External User (email)
Peter ShermanTest <shermanps@gmail.com> x
Lookup
Send Type Action Required ?
 Notify Only ?
* Respond By 03.20.2021
CC Roles
Administrative Support
Assistant Engineering Services Director
Business Manager
Business Supervisor
Communications Specialist
Construction Project Coordinator
Contracts Administrator
eB Super User
eB System Admin
Engineer Manager
CC Users
Implementation, e-Builder (e-Builder, Inc.)
Sudhni, Sai (City of Raleigh)
CC External Users Via Email
Type to search...
Lookup
Documents \ 20_Construction \ 20.10_Submittals [Change folder] [Remove Folder]
Message
Please review and respond if you agree/disagree with these items



Submittals – Send for Review - Action Req'q email

Action Req'd - z_2021_Test_Project_2 - Submittal item(s) sent for review



Peter Sherman via e-Builder <bounces@e-builder.net>

To Sherman, Peter



If there are problems with how this message is displayed, [click here to view it in a web browser.](#)

[Click here to download pictures.](#) To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

z_2021_Test_Project_2

The following submittal item(s) have been sent for review. To review these submittal item(s), [click here.](#)

Title	#	Rev #	Status	Category	Package #	Priority	Date Due
Submittal/Product Title	1	0	NEW	Material Data/Product Literature	1-0-0	Normal	03.22.2021

Peter Sherman
919-996-2521

e-Builder Technical Support

phone: 1-888-288-5717 fax: 1-888-576-9322



Submittals – Send for Review – Homepage of Actor

Submittal items in your court

Filter by Actions

All in my court

Show

First ten

Project	Title	#	Rev #	Package #	Status	Due Date	Held By
z_2021_Test_Project_2	Shop Drawing Title	12	0	5-Test RAR-0	Revise & Resubmit		Peter ShermanTest
z_2021_Test_Project_2	Sample Title	2	0	1-0-0	NEW		Peter ShermanTest
z_2021_Test_Project_2	Submittal/Product Title	15	1	4-00 10 00-1	NEW		Peter ShermanTest



Submittals – Send for Review – Reviewer View

Submittal Package Details

Submittal Package Overview | History

Request Comment | Generate Transmittal

Project Title	z_2021_Test_Project_2 GC Procurement Forms	Project Number	23
Description		Status	Open
Submittal Package #	7-00 40 00-0	Trade	PROCUREMENT FORMS AND SUPPLEMENTS
Date Created	10.22.2021 10:10 AM	Created By	ShermanTest, Peter
Submittal Coordinator	Peter Sherman		
Items Held By	Peter Sherman		
Baseline Start Range	11.01.2021 - 11.01.2021	Baseline Finish Range	11.01.2021 - 11.01.2021

Update Status – for all items in package

Send to Contractor – Return items to contractor, completing your review

Send to Sub

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

Update Status | Send to Contractor | Forward for Review

Item Details	Title	#	Rev #	Spec Section	Sub Section	Category	Status	Submittal Coordinator	Held By	Reviewers
<input checked="" type="checkbox"/>	Shop Drawing Title	34	0	07 61 10 - SHEET METAL ROOFING - SHOP DRAWINGS	001	Shop Drawing	No Except	Peter Sherman	Peter Sherman	Reviewers



Raleigh

Submittals – Send for Review – Statuses

Status Options

Please contact Veronica High
(veronica.high@raleighnc.gov) with
suggestions for other options

Prefix	Status
AAR	Amend & Resubmit
APP	Approved
AAN	Approved As Noted
FYI	For Information Only
FRO	For Record Only
MCN	Make Corrections Noted
NET	No Exceptions Taken
ONH	On Hold
REJ	Rejected
RAR	Revise & Resubmit

No Excep: ▼ Peter Sherman Peter Sherman



Submittals - Reviewers Options

- Use the “Update Status” button to update the status for all package items at once
- Use the Status drop down to update individual item statuses
- “Send to Contractor” should be interpreted as “Return to GC” to complete your review (if you’re not the GC) and send it back



Raleigh

Submittals – Send for Review – RAR

To create a revision:

1. Change status to Revise & Resubmit
2. Fill out comment that will pop up
3. Click Send to Contractor to return it
4. Click Send to Contractor again in the next window shown here

The screenshot shows a dialog box titled "Send to Contractor". At the top right, there are two buttons: "Send to Contractor" and "Cancel". The main area of the dialog is a table with the following data:

Project	z_2021_Test_Project_2
Project Number	23
Title	GC Procurement Forms
* Send To	Peter ShermanTest
CC Roles	<ul style="list-style-type: none">Administrative SupportAssistant Engineering Services DirectorBusiness ManagerBusiness SupervisorCommunications SpecialistConstruction Project CoordinatorContracts AdministratoreB Super User

There are also navigation arrows (left and right) next to the CC Roles list.



Raleigh

Submittals – Send for Review – RAR

To create a revision:

5. Back in the contractor's court, they will see this:

6. Click Create Revision

Submittal Package Details

Submittal Package Overview History

Request Comment Update Dates Generate Transmittal Close Edit

Project	z_2021_Test_Project_2	Project Number	23
Title	GC Procurement Forms	Status	Open
Description		Trade	PROCUREMENT FORMS AND SUPPLEMENTS
Submittal Package #	7-00 40 00-0	Created By	ShermanTest, Peter
Date Created	10.22.2021 10:10 AM	Baseline Finish Range	11.01.2021 - 11.01.2021
Items Held By	Peter ShermanTest		
Baseline Start Range	11.01.2021 - 11.01.2021		

Click Check Box

Click Create Revision

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

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

Send for Review Submit to GC Send to Sub Create Revision Add Items Remove Items

Item Details	Title	#	Rev #	Spec Section	Sub Section	Category	Status	Submittal Coordinator	Held By	Reviewers
<input type="checkbox"/>	Shop Drawing Title	34	0	07 61 10 - SHEET METAL ROOFING - SHOP DRAWINGS	001	Shop Drawing	RAR		Peter ShermanTest	Reviewers



Raleigh

Submittals – Send for Review – RAR

To create a revision:

7. A new package will be created with a - 1 added to the package number to indicate it is a revision. I've also added 'resubmit' to the package name here.

Create Revision Package

Save Cancel

Details

Project	z_2021_Test_Project_2
Project Number	23
Submittal Package #	7 - 00 40 00 - 1
* Submittal Package Name	<input type="text" value="GC Procurement Forms - resubmit"/>
Description	<input type="text"/>
Trade	<input type="text" value="PROCUREMENT FORMS AND SUPPLEMENTS"/>

Custom Fields

There are no custom fields for this submittal package.

Page 1 of 1 Show 25 per page

Title	#	Rev #	Spec Section	Sub Section	Category	Status
? Shop Drawing Title	34	1	07 61 10 - SHEET METAL ROOFING - SHOP DRAWINGS	001	Shop Drawing	RAR

Save Cancel



Raleigh

Submittals – Send for Review – RAR

To create a revision:

8. Example resubmit package. Note the Revisions(1) tab and original package number.

Submittal Package Overview **History**

Request Comment Update Dates Generate Transmittal Edit

Project	z_2021_Test_Project_2	Project Number	23
Title	GC Procurement Forms - resubmit	Status	Draft
Description		Trade	PROCUREMENT FORMS AND SUPPLEMENTS
Submittal Package #	7-00 40 00-1	Created By	ShermanTest, Peter
Date Created	10.22.2021 10:44 AM	Baseline Finish Range	
Items Held By	Peter ShermanTest		
Baseline Start Range			
Original Submittal Package #	7-00 40 00-0		

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

Group By Page of 1 Show per page

Send for Review Submit to GC Send to Sub Add Items Remove Items

Item Details	Title	#	Rev #	Spec Section	Sub Section	Category	Status	Submittal Coordinator	Held By	Reviewers
<input type="checkbox"/>	Shop Drawing Title	34	1	07 61 10 - SHEET METAL ROOFING - SHOP DRAWINGS	001	Shop Drawing	NEW		Peter ShermanTest	



Raleigh

Submittals – Send for Review – RAR

To create a revision:

9. The original submittal package is automatically closed when the revision is created:



<input type="button" value="Create Package"/> <input type="button" value="Send for Review"/>						
Package #	Date Created	Last Modified Date	Sent for Review	Held By	Trade	Status
1-0-0	03.11.2021	10.22.2021			Safety	Closed
1-0-1	03.22.2021	03.22.2021		Sai Sudhni	Safety	Draft
7-00 40 00-0	10.22.2021	10.22.2021			PROCUREMENT FORMS AND SUPPLEMENTS	Closed
7-00 40 00-1	10.22.2021	10.22.2021		Peter ShermanTest	PROCUREMENT FORMS AND SUPPLEMENTS	Draft




Submittals - Acknowledge

Example email
when the reviewer
returns the
submittal to the
sender:

Action Req'd - z_2021_Test_Project_2 - Submittal item(s) have been returned to you

 Peter Sherman via e-Builder <bounces@e-builder.net>
To  Sherman, Peter

 If there are problems with how this message is displayed, click here to view it in a web browser.
Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

CAUTION: This email originated from outside of the organization. Do not click links or open attachments unless you verify that you believe this email is suspicious, please click the 'Phish Alert' link in the banner to report this message.

z_2021_Test_Project_2

The following submittal item(s) have been returned to you. To review these submittal item(s), [click here](#).

Title	#	Rev #	Status	Category	Package #	Priority	Date Due
Shop Drawing Title	34	1	No Exceptions Taken	Shop Drawing	7-00 40 00-1	Normal	11.01.2021

e-Builder Technical Support
phone: 1-888-288-5717 fax: 1-888-576-9322
support@e-builder.net



Submittals - Acknowledge

Close



Sender - when the submittal is returned to you, click Close to acknowledge receipt

Submittal Package Overview **History**

Request Comment Update Dates Generate Transmittal **Close** Edit

Project	z_2021_Test_Project_2	Project Number	23
Title	GC Procurement Forms - resubmit	Status	Open
Description		Trade	PROCUREMENT FORMS AND SUPPLEMENTS
Submittal Package #	7-00 40 00-1	Created By	ShermanTest, Peter
Date Created	10.22.2021 10:44 AM	Baseline Finish Range	11.01.2021 - 11.01.2021
Items Held By	Peter ShermanTest		
Baseline Start Range	11.01.2021 - 11.01.2021		
Original Submittal Package #	7-00 40 00-0		

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

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

Send for Review Submit to GC Send to Sub Create Revision Add Items Remove Items

Item Details	Title	#	Rev #	Spec Section	Sub Section	Category	Status	Submittal Coordinator	Held By	Reviewers
<input type="checkbox"/>	Shop Drawing Title	34	1	07 61 10 - SHEET METAL ROOFING - SHOP DRAWINGS	001	Shop Drawing	NET		Peter ShermanTest	Reviewers



Submittals - Acknowledge

Click Continue

Close Package

Are you sure you want to close the submittal package? All open submittal items in the package will be closed.



Submittals – View Closed

From the Register or the Package menu, uncheck the other checkboxes and click Closed, then click Filter

Filter Submittal Packages

Search In All Pending My Review

Package Status Open Closed Draft Overdue

Title

Trade

Description

Submittal Package # -

Priority

- Rev

Custom Field 1

Custom Field 2

Page of 1 Show per page

Package #	Date Created	Last Modified Date	Sent for Review	Held By	Trade	Status
1-0-0	03.11.2021	10.22.2021			Safety	Closed
7-00 40 00-0	10.22.2021	10.22.2021			PROCUREMENT FORMS AND SUPPLEMENTS	Closed
3-4 - Landscaping-0	05.11.2021	05.14.2021				Closed
4-00 10 00-0	05.14.2021	05.14.2021			SOLICITATION	Closed



Questions?

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