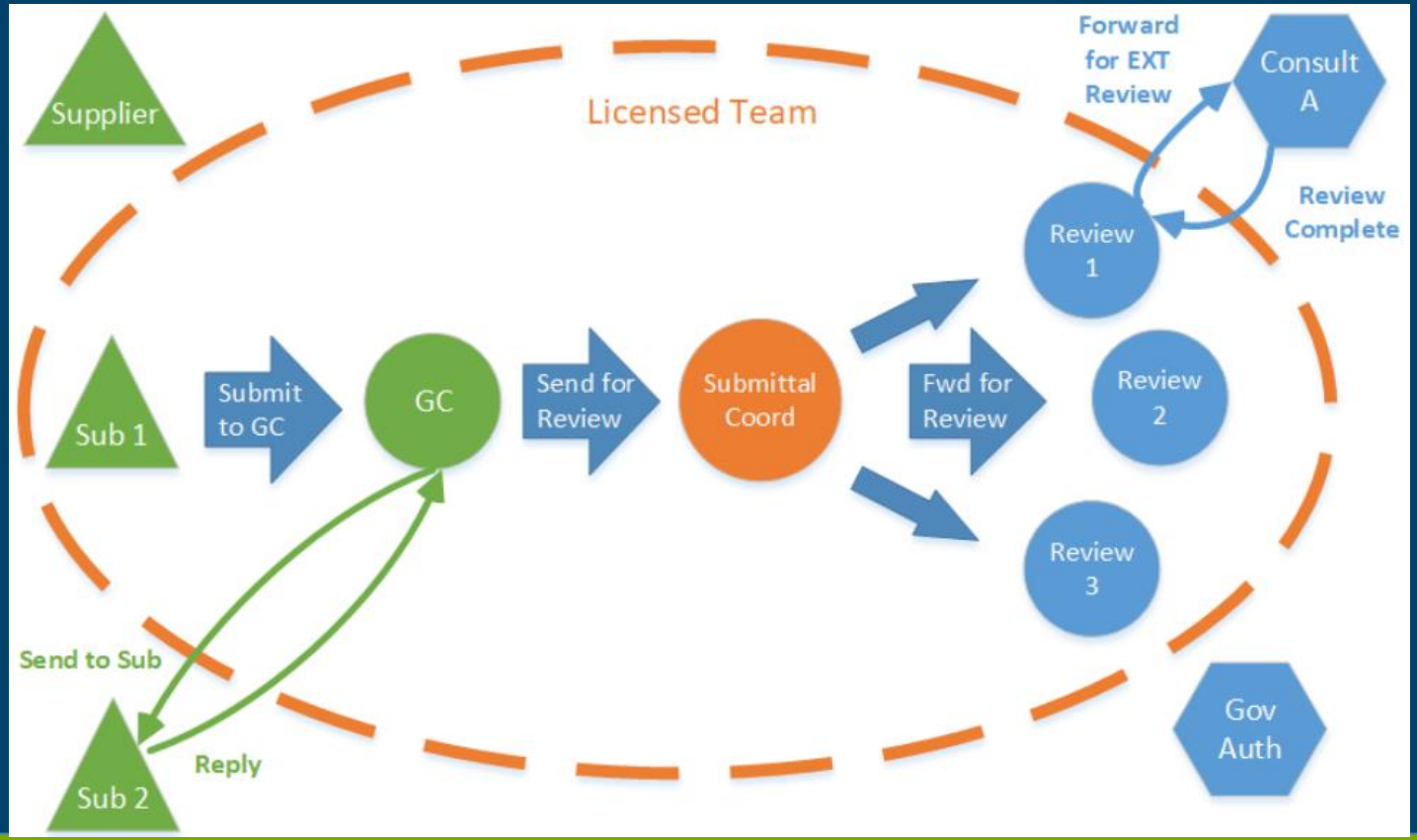
e-Builder Submittals

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

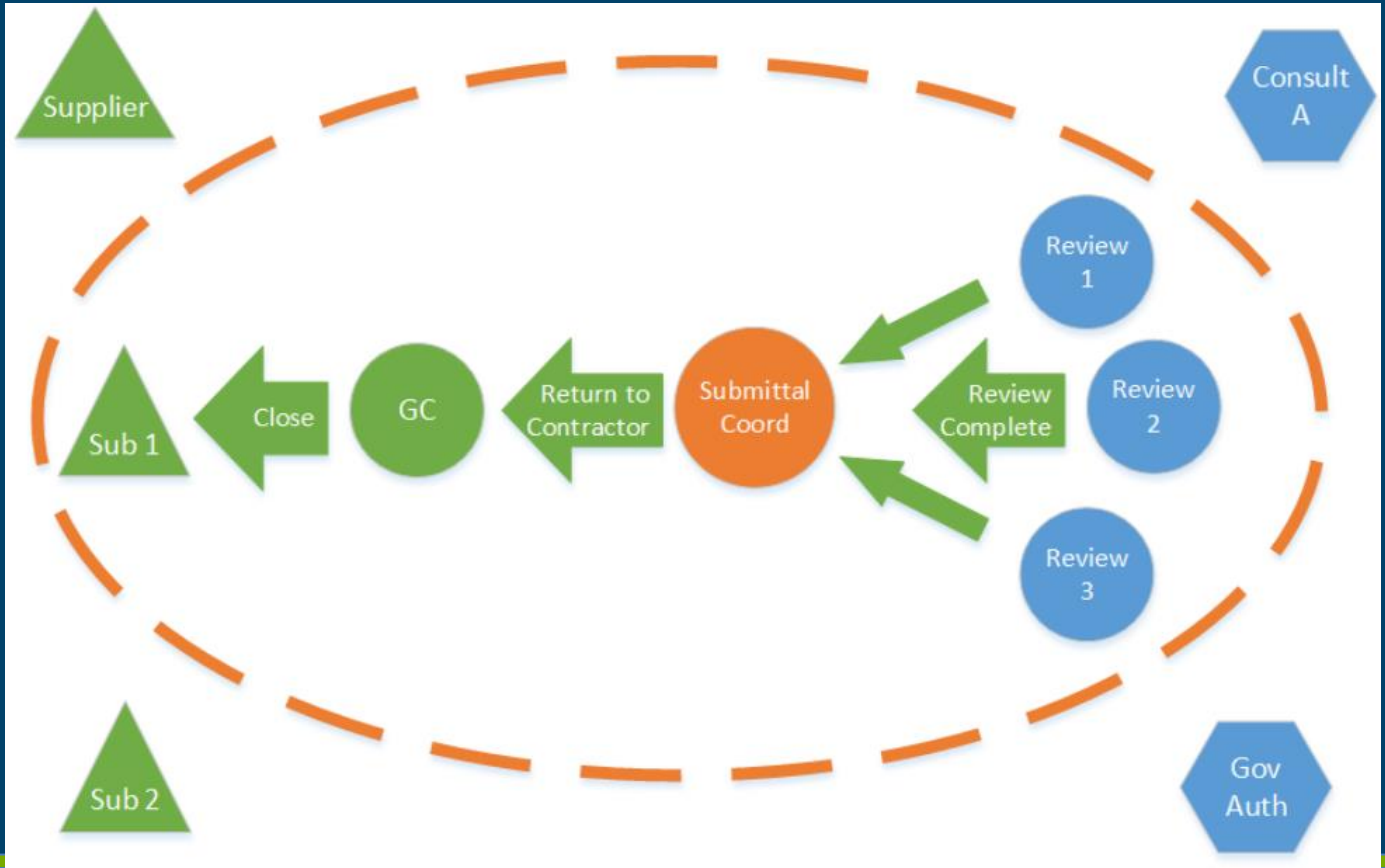
Raleigh

October 21, 2021

Submittals – Forward

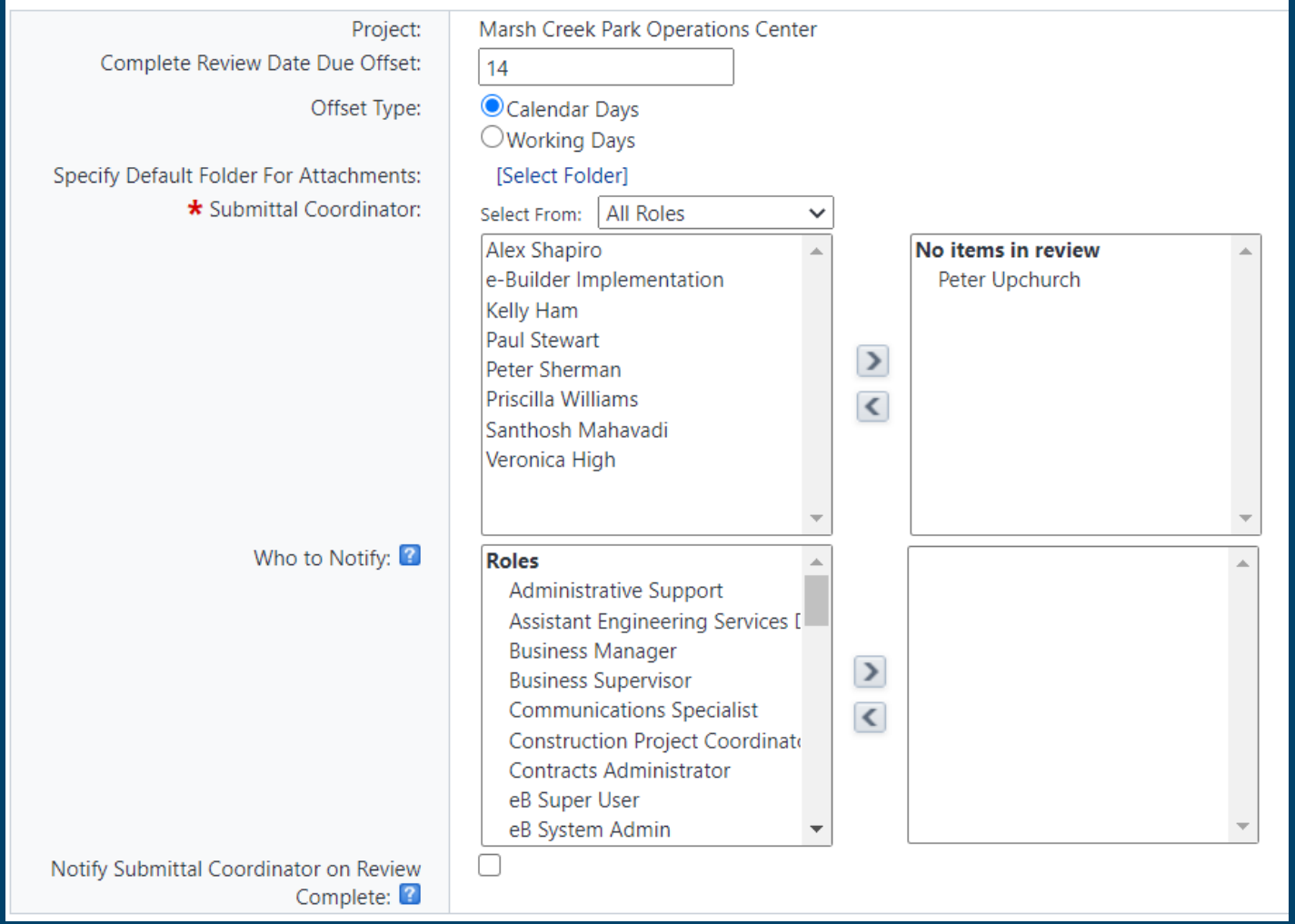


Submittals - Return



Submittals - Setup

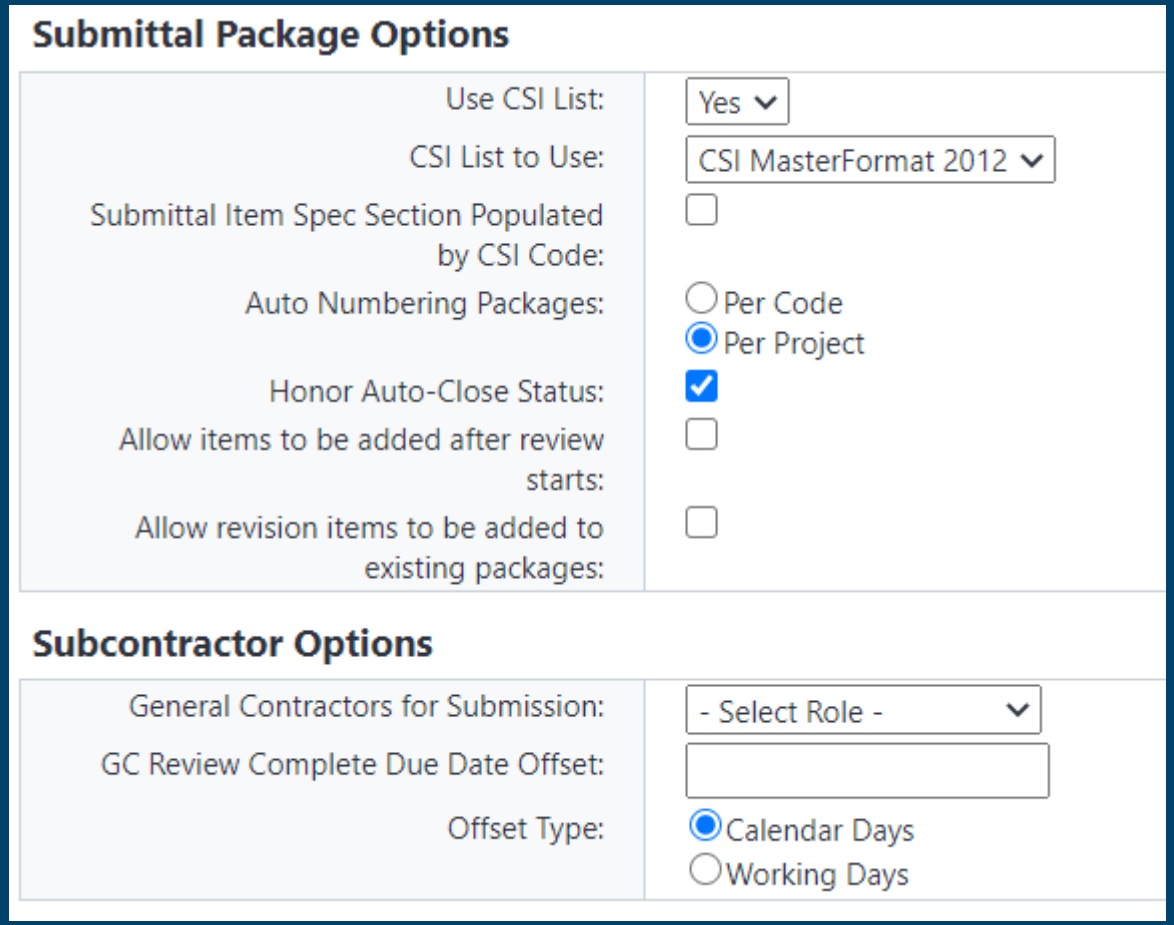
Coordinator should be Consultant or A/E



Raleigh

Submittals - Setup

Optional Settings



Submittals - Register

Ignore Filter Submittal Items, that's just for searching

Submittal Register for Marsh Creek Park Operations Center

Filter Submittal Items

Search In	All / Pending my review	Item Status	Open / Closed / Draft / Overdue
Title		Description	
Status	Please select a status...	Category	Please select a category...
Number		Priority	Please select...
Revision		Spec Section	
Submittal Package #	- - Rev	Sub Section	
Responsible Sub/Manufacturer		Submittal Coordinator	Please select...
Custom Field 1	Please select a	Reviewer	
Custom Field 2	Please select a		

Clear Filter

Group By None Page 1 of 1 Show 100 per page

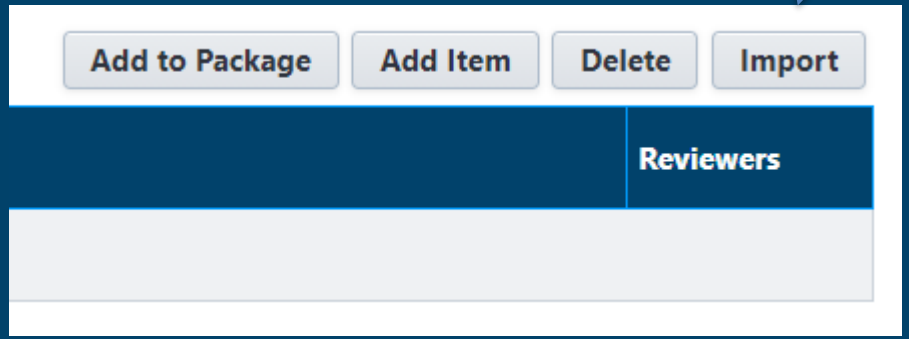
Send to Sub | Add to Package | Add Item | Delete | Import

Item Details	Title	#	Rev #	Package #	Spec Section	Sub Section	Category	Status	Submittal Coordinator	Held By	Reviewers
	Project Schedule	*1*	*0*		*13100*		*Progress Schedule*	*NEW*			

Submittals - Register

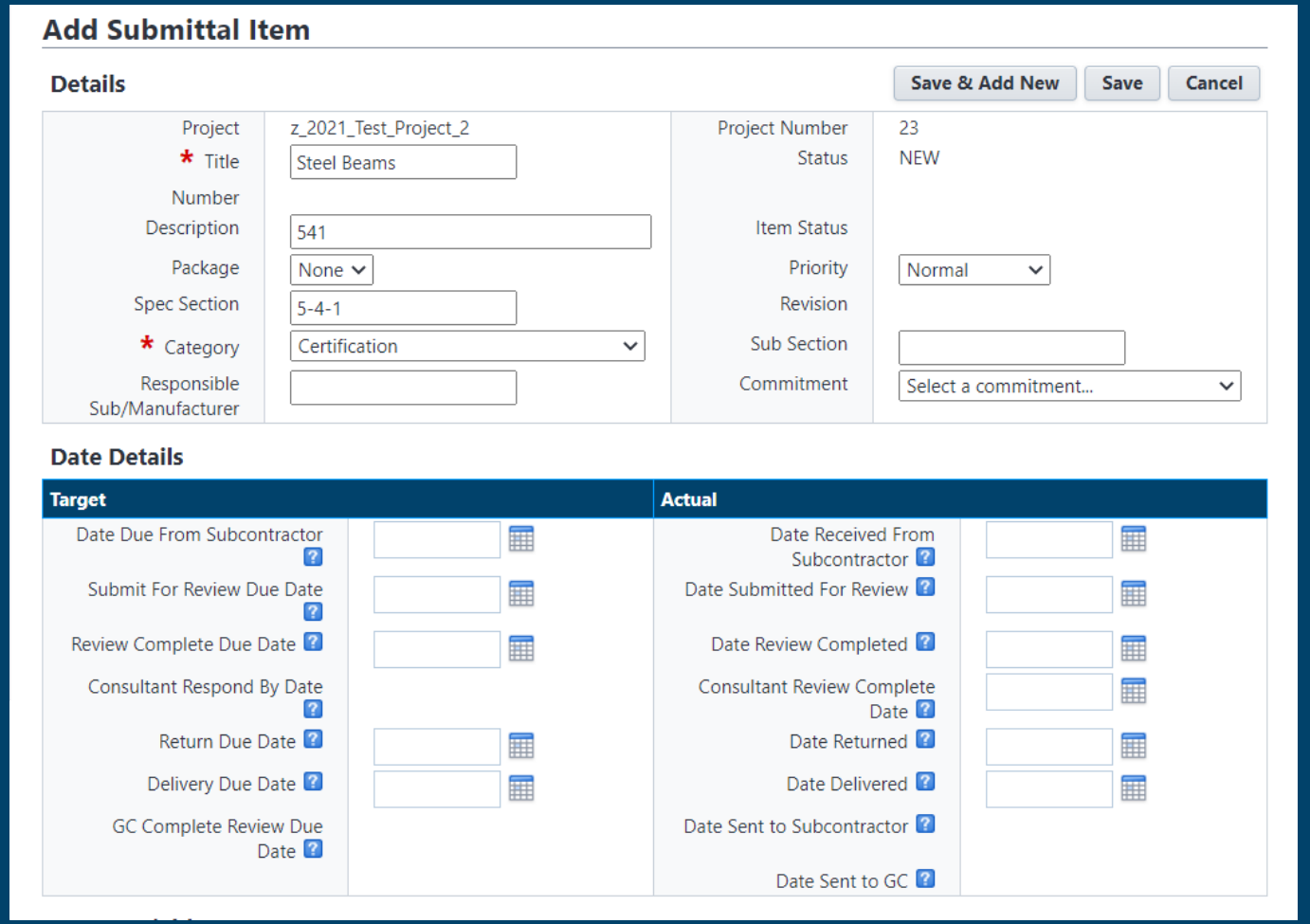
Manually add Submittal Register item

Import an excel sheet of the register



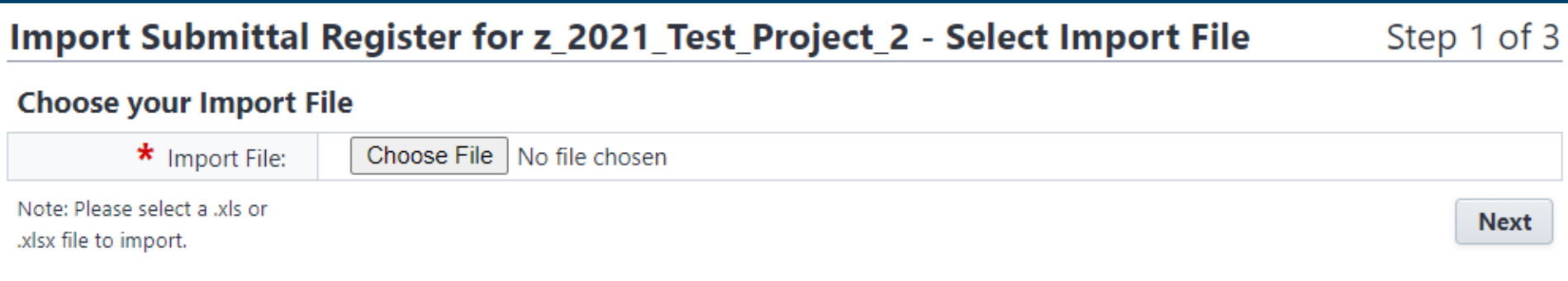
Submittals - Register

Manually add Submittal Register item – not commonly used



Submittals - Register

Import Submittal Items



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

Import Submittal Register for z_2021_Test_Project_2 - Field Mappings

Step 2 of 3

Submittal Item Built-In Fields

Previous | Next | Cancel

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

Submittal Item Custom Fields

There are no submittal item custom fields.

Previous | Next | Cancel

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 None Page 1 of 2 Show 100 per page

Send to Sub | Add to Package | Add Item | Delete | Import | Submit to GC

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

Submittal Packages

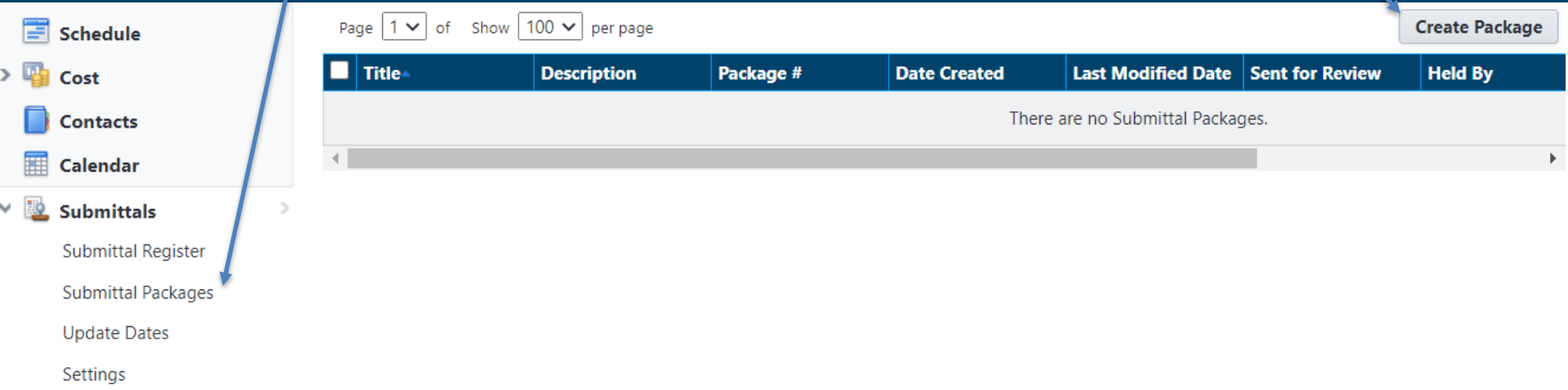
1. Create Package
2. Add registry items to package
3. Send individual items or entire package for review
    1. If needed, forward to additional reviewers
4. Receive items/package back and acknowledge or create a revision

(Steps shown on following slides)

Submittals - Packages

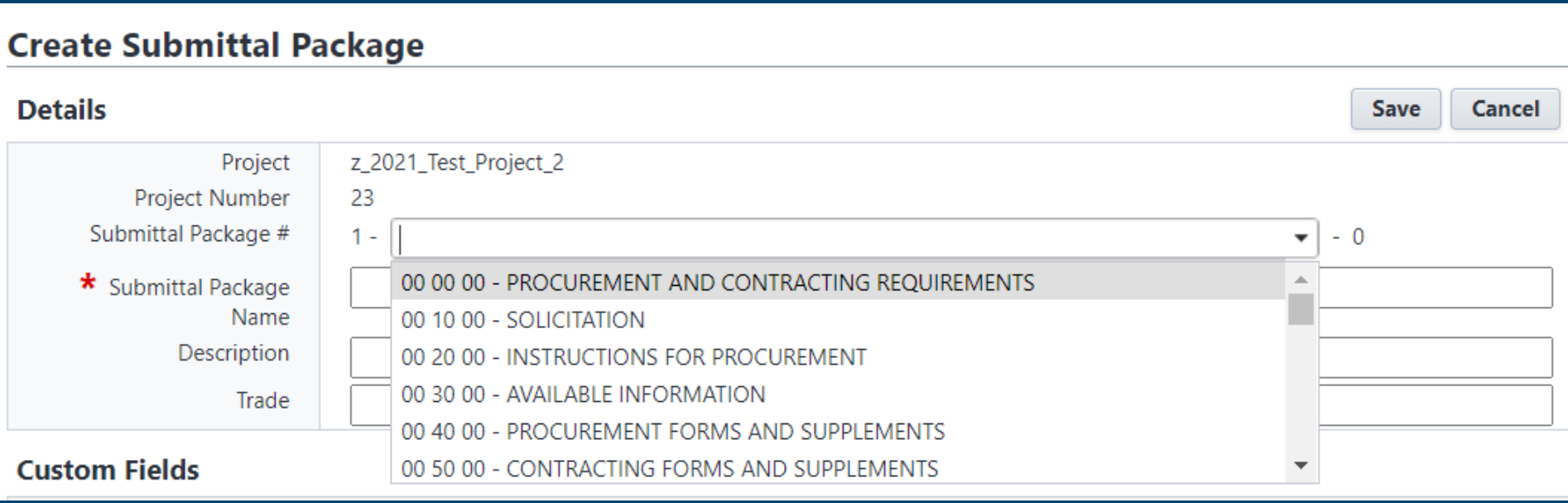
Click Submittal Packages

Click Create Package



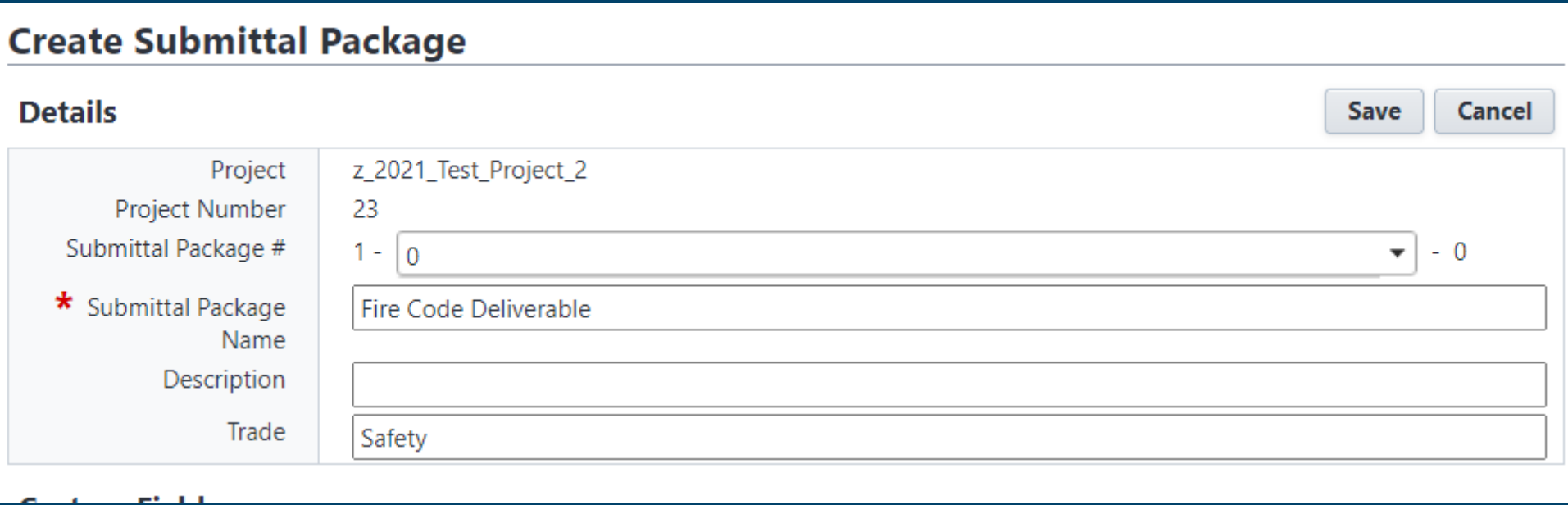
Submittals - Packages

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



Submittals - Packages

Example of a filled out package:



Submittal – Packages – Add Items

Submittal Package Details

Submittal Package Overview | History

Request Comment | Update Dates | Generate Transmittal | Delete | Edit

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

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

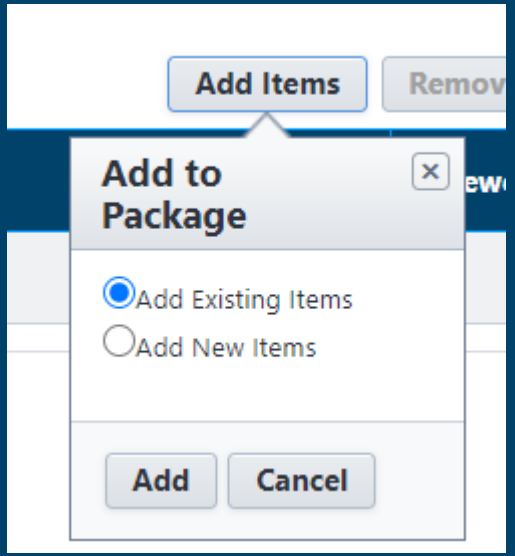
Group By None Page 1 of Show 10 per page

Add Items | Remove Items

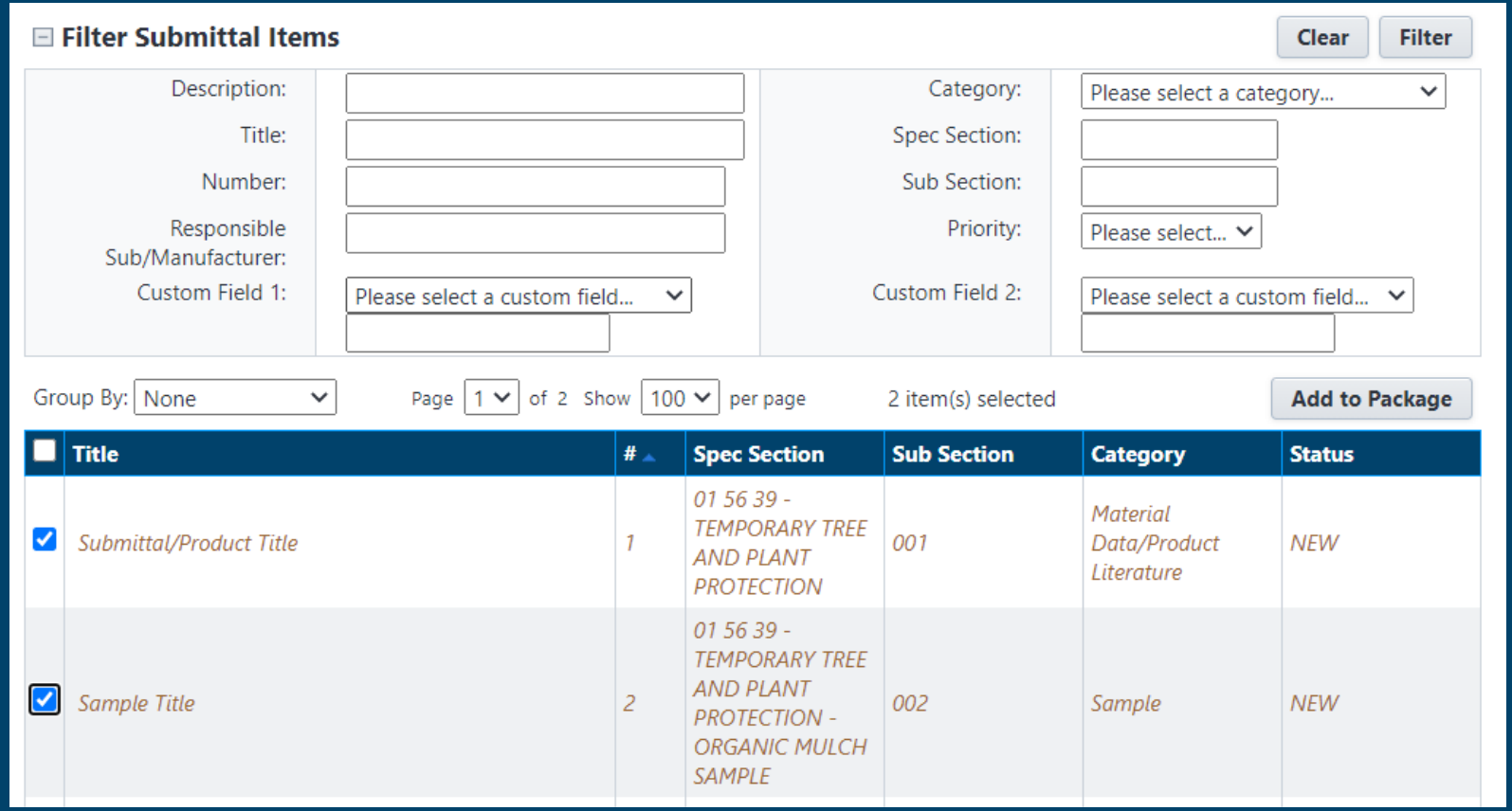
Item Details	Title	#	Rev #	Spec Section	Sub Section	Category	Status	Submittal Coordinator	Held By	Reviewers
There are no submittal items in this package										

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

Clear | Filter

Description:		Category:	Please select a category...
Title:		Spec Section:	
Number:		Sub Section:	
Responsible Sub/Manufacturer:		Priority:	Please select...
Custom Field 1:	Please select a custom field...	Custom Field 2:	Please select a custom field...

Group By: None | Page 1 of 2 | Show 100 per page | 2 item(s) selected | Add to Package

	Title	#	Spec Section	Sub Section	Category	Status
☑	*Submittal/Product Title*	*1*	*01 56 39 - TEMPORARY TREE AND PLANT PROTECTION*	*001*	*Material Data/Product Literature*	*NEW*
☑	*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	z_2021_Test_Project_2	Project Number	23
Title	Fire Code Deliverable	Status	Draft
Description			
Submittal Package #	1-0-0	Trade	Safety
Date Created	03.11.2021 2:47 PM	Created By	Sherman, Peter
Items Held By			
Baseline Start Range		Baseline Finish Range	

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

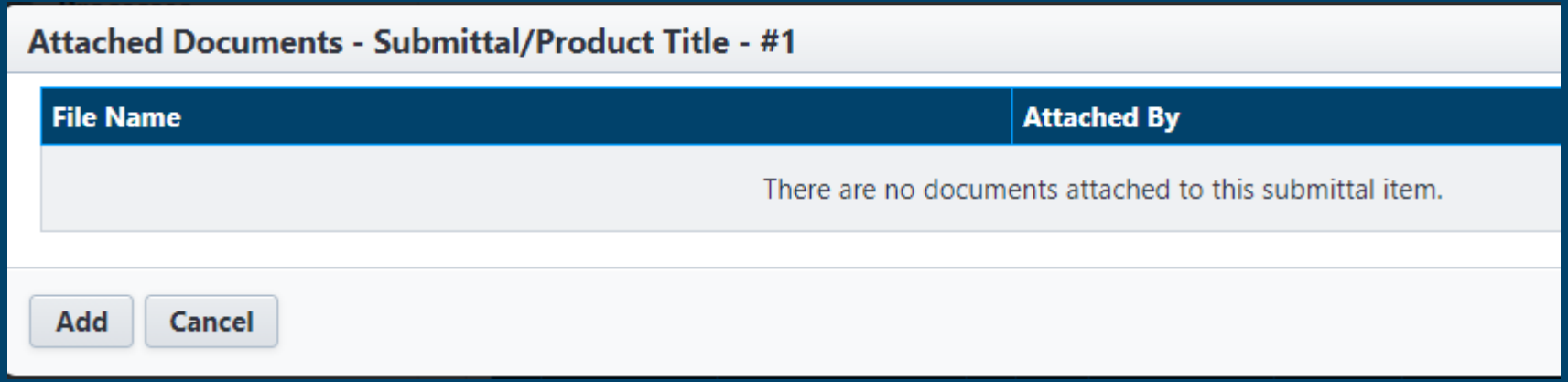
Group By None Page 1 of 1 Show 10 per page

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

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

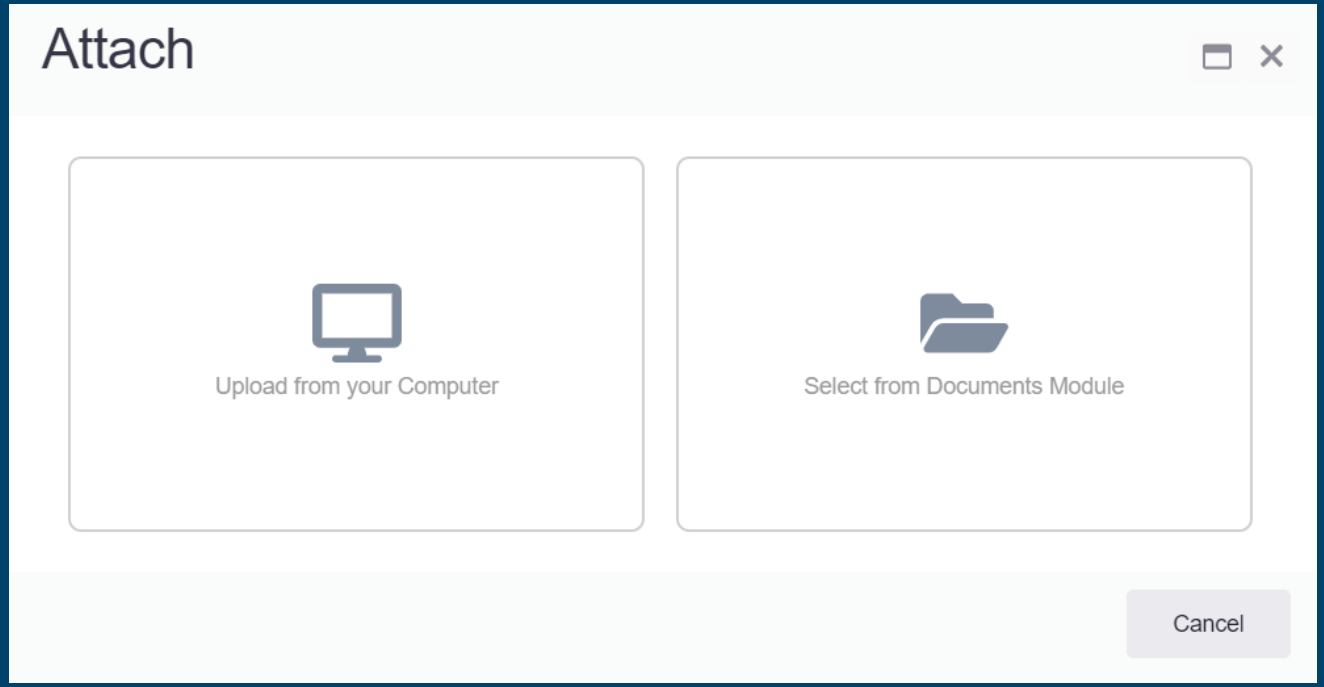
Submittals – Packages

Click Add



Submittals – Packages

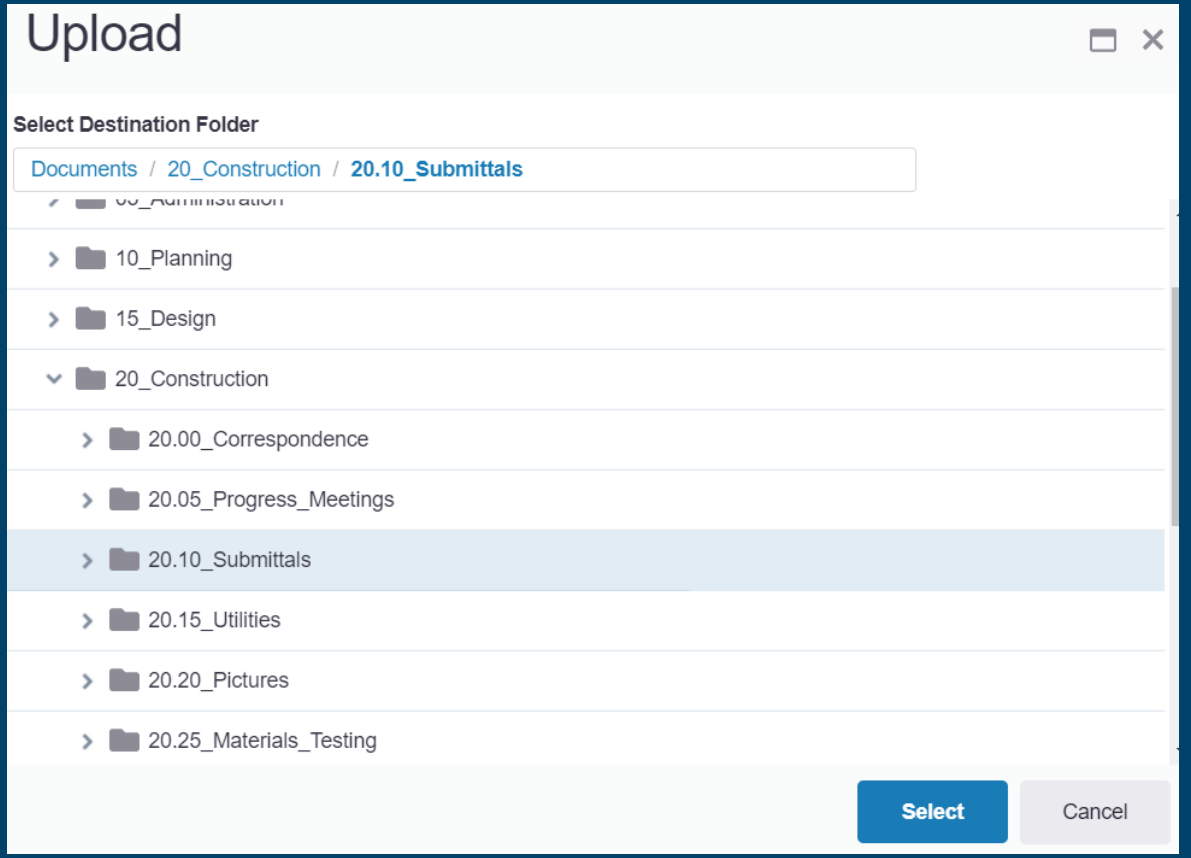
This is the standard attachment window for e-Builder. Use “Upload from your Computer” unless the document is already in your project.



Submittals – Packages

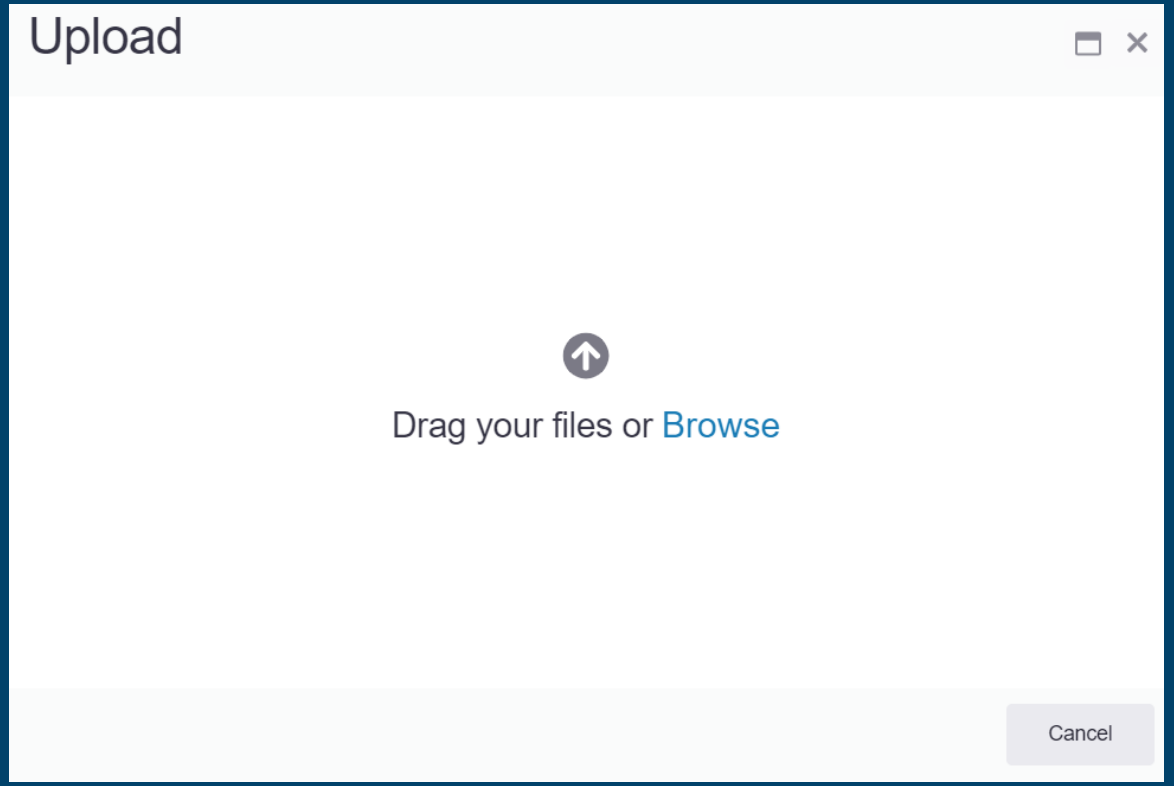
Upload from your Computer – before you can upload, you must select where in your project the file will live.

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



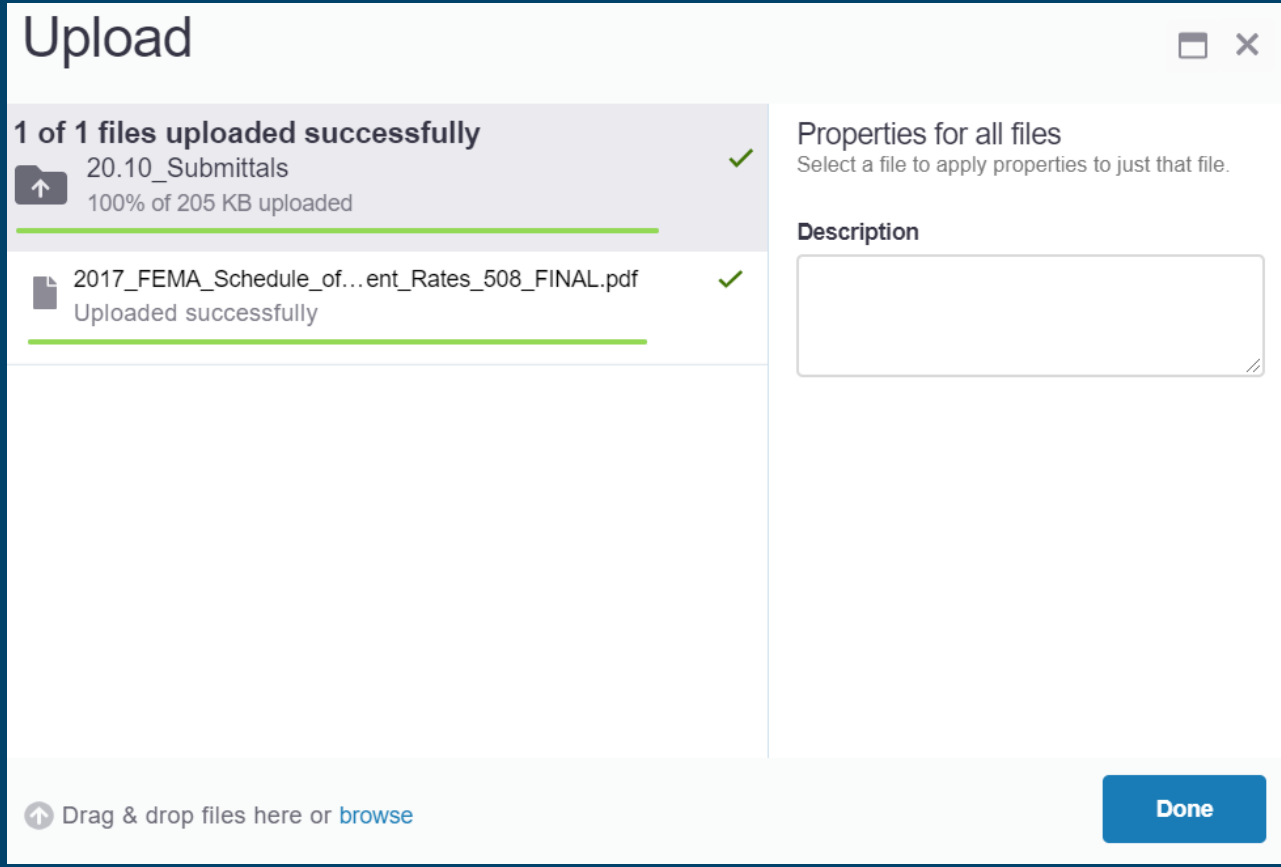
Submittals – Packages

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



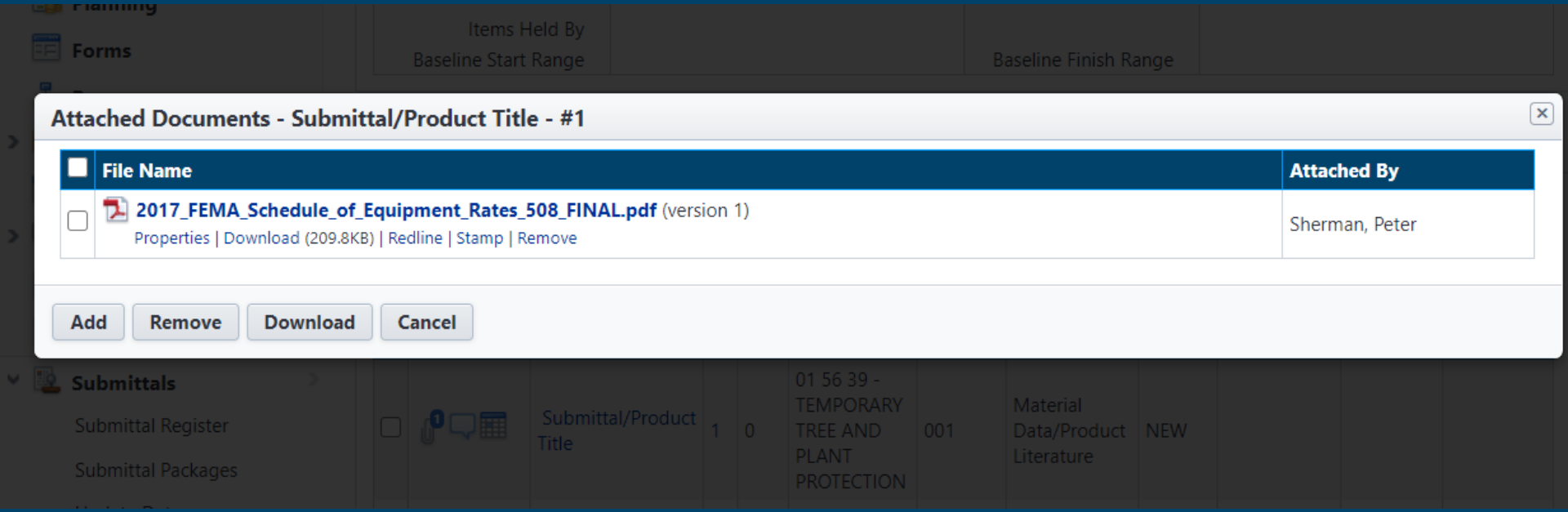
Submittals – Packages

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



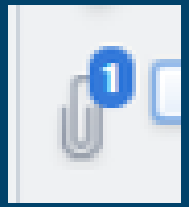
Submittals – Packages

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



Submittals – Packages

The number here shows how many attachments there are



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

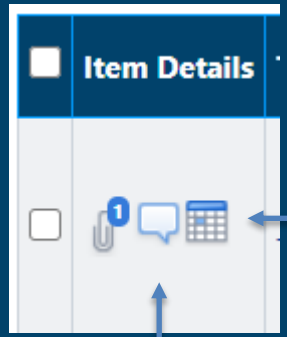
Group By None Page 1 of 1 Show 10 per page

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

Item Details	Title	#	Rev #	Spec Section	Sub Section	Category	Status	Submittal Coordinator	Held By	Reviewers
1	Submittal/Product Title	1	0	01 56 39 - TEMPORARY TREE AND PLANT PROTECTION	001	Material Data/Product Literature	NEW			
0	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

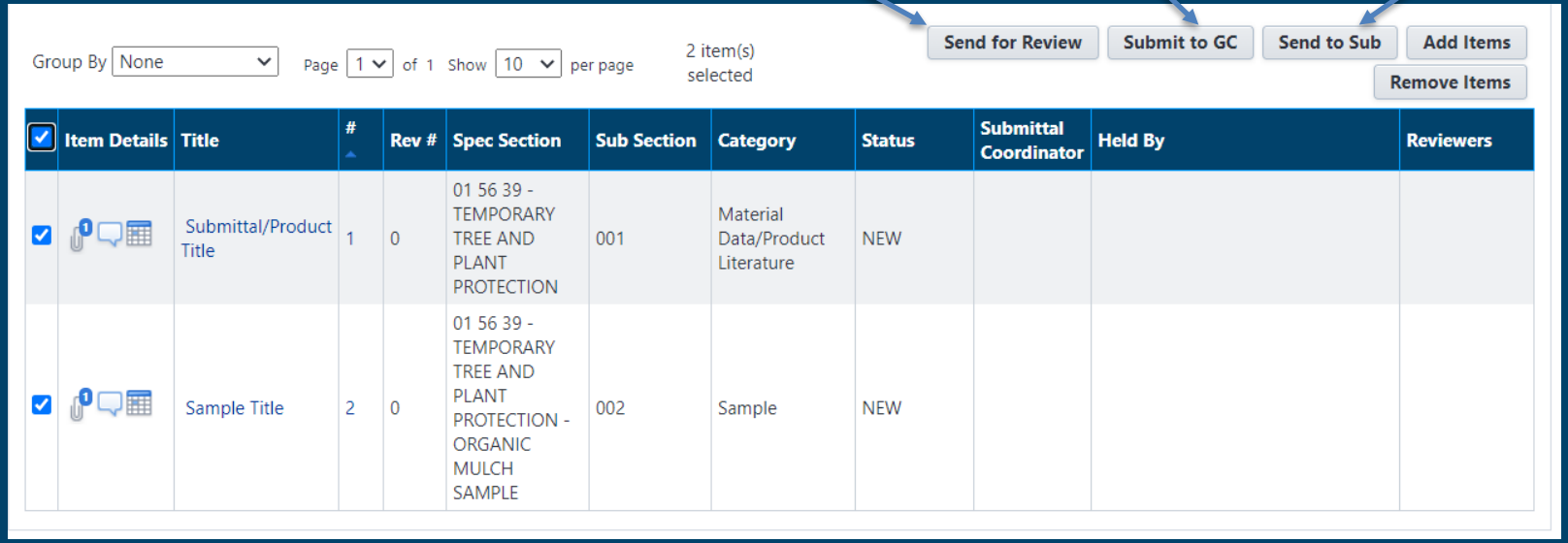
Submittals – Send for Review – Within Package

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



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

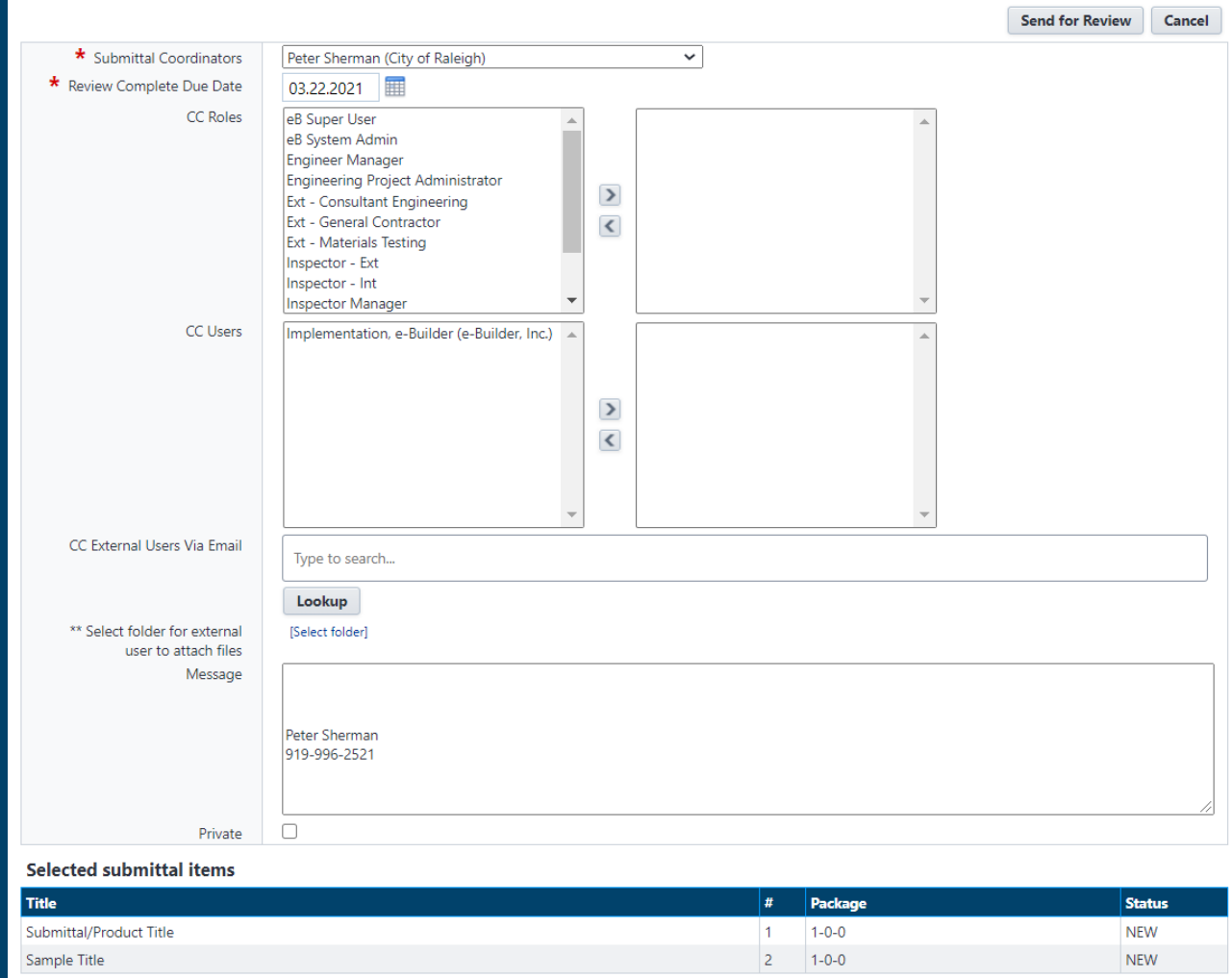
Create Package | Send for Review

Title	Description	Package #	Date Created	Last Modified Date	Sent for Review	Held By	Trade	Status
Fire Code Deliverable - resubmit		1-0-1	03.22.2021	03.22.2021		Sai Sudhni	Safety	Draft
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

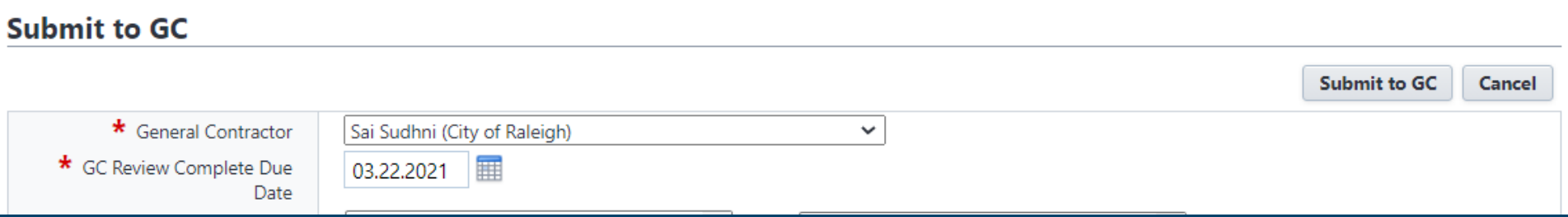
Package #	Date Created	Last Modified Date	Sent for Review	Held By	Trade	Status
1-0-1	03.22.2021	03.22.2021		Sai Sudhni	Safety	Draft
7-00 40 00-0	10.22.2021	10.22.2021	✔	Peter Sherman	PROCUREMENT FORMS AND SUPPLEMENTS	Open

Submittals – Send for Review



Submittals – Send to GC

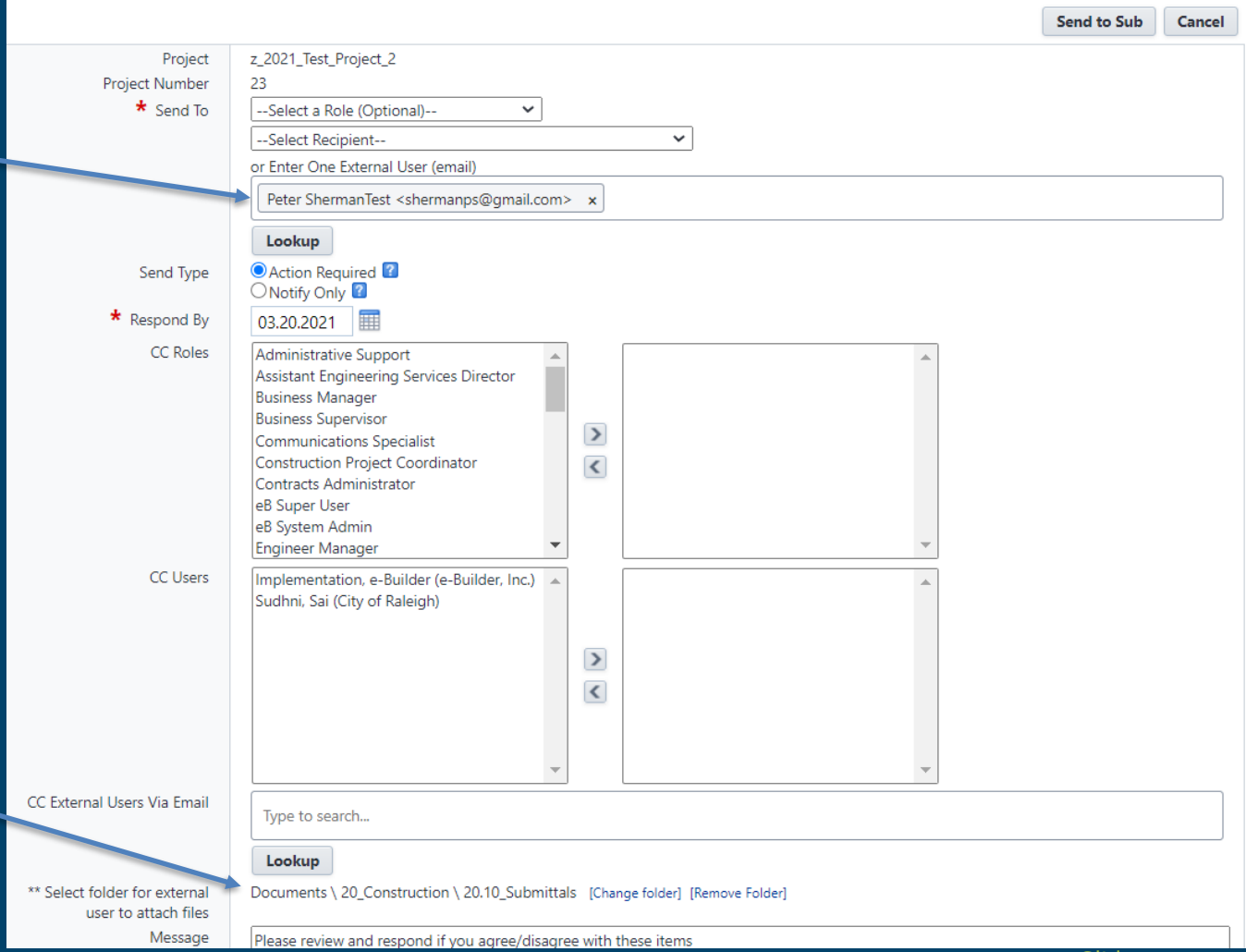
Same as previous screen, just selects the GC on the project instead of the submittal coordinator.
If this is not showing up correctly, then the Submittal settings need to be adjusted for your project.



Submittals – Send to Sub

Enter email

Make sure to select a folder for their attachments



Submittals – Send for Review - Action Req’q email

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

PS

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 m

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

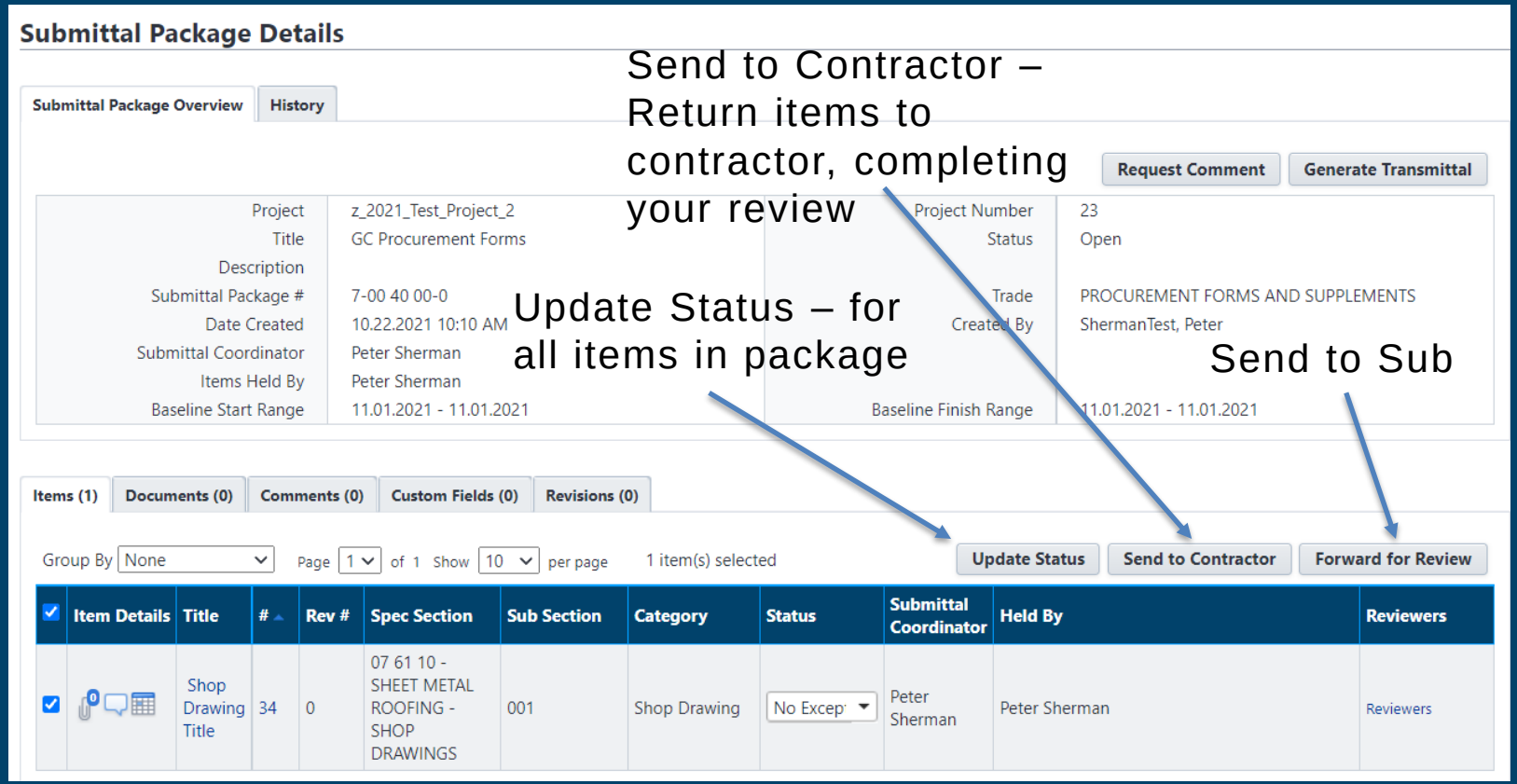
Submittals – Send for Review – Homepage of Actor

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



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

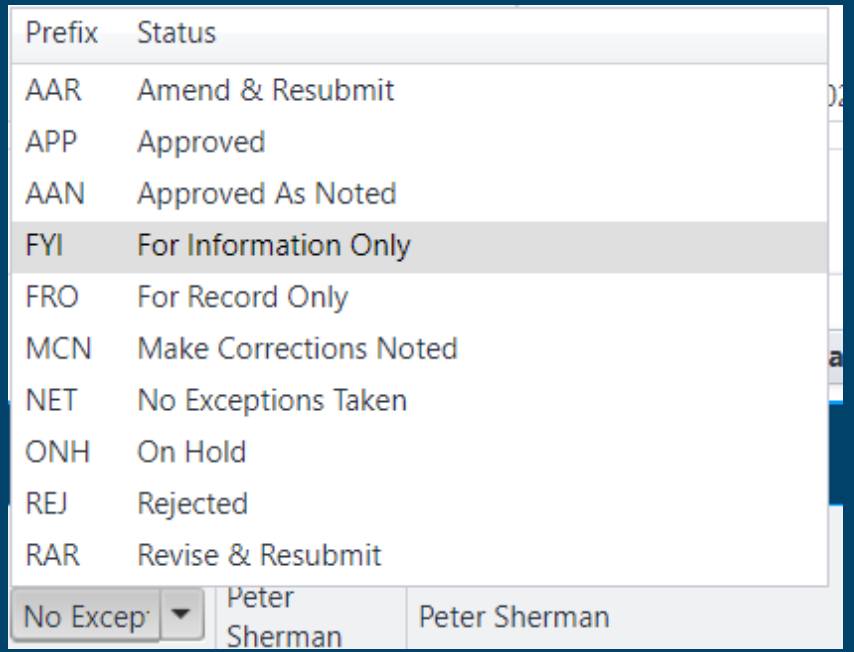
Update Status – for all items in package

Send to Sub

Submittals – Send for Review – Statuses

Status Options

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



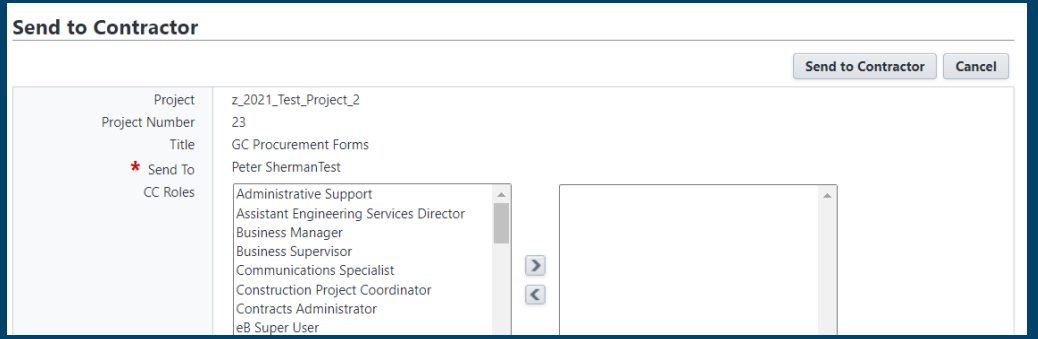
Submittals - Reviewers Options

- 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

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

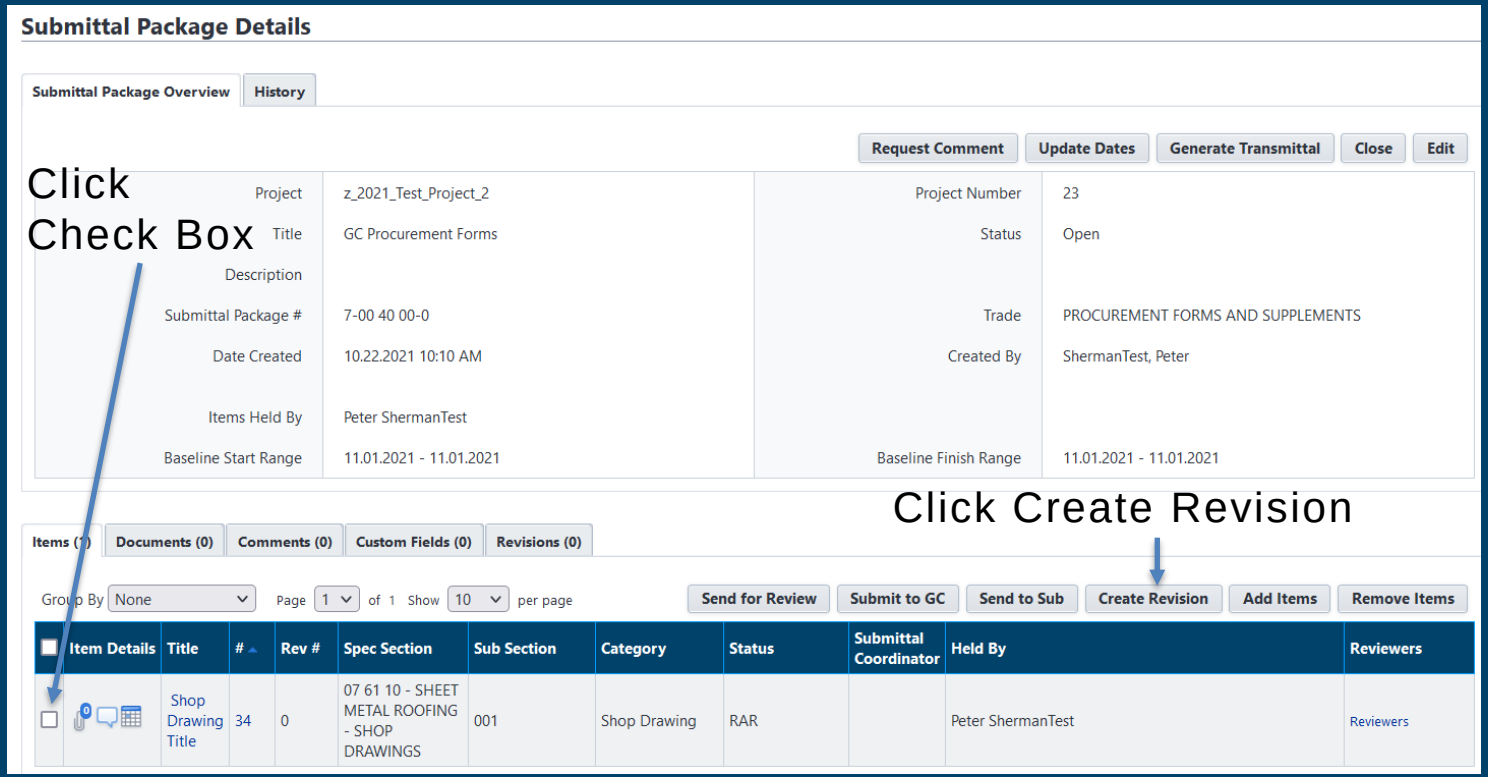


Submittals – Send for Review – RAR

To create a revision:

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

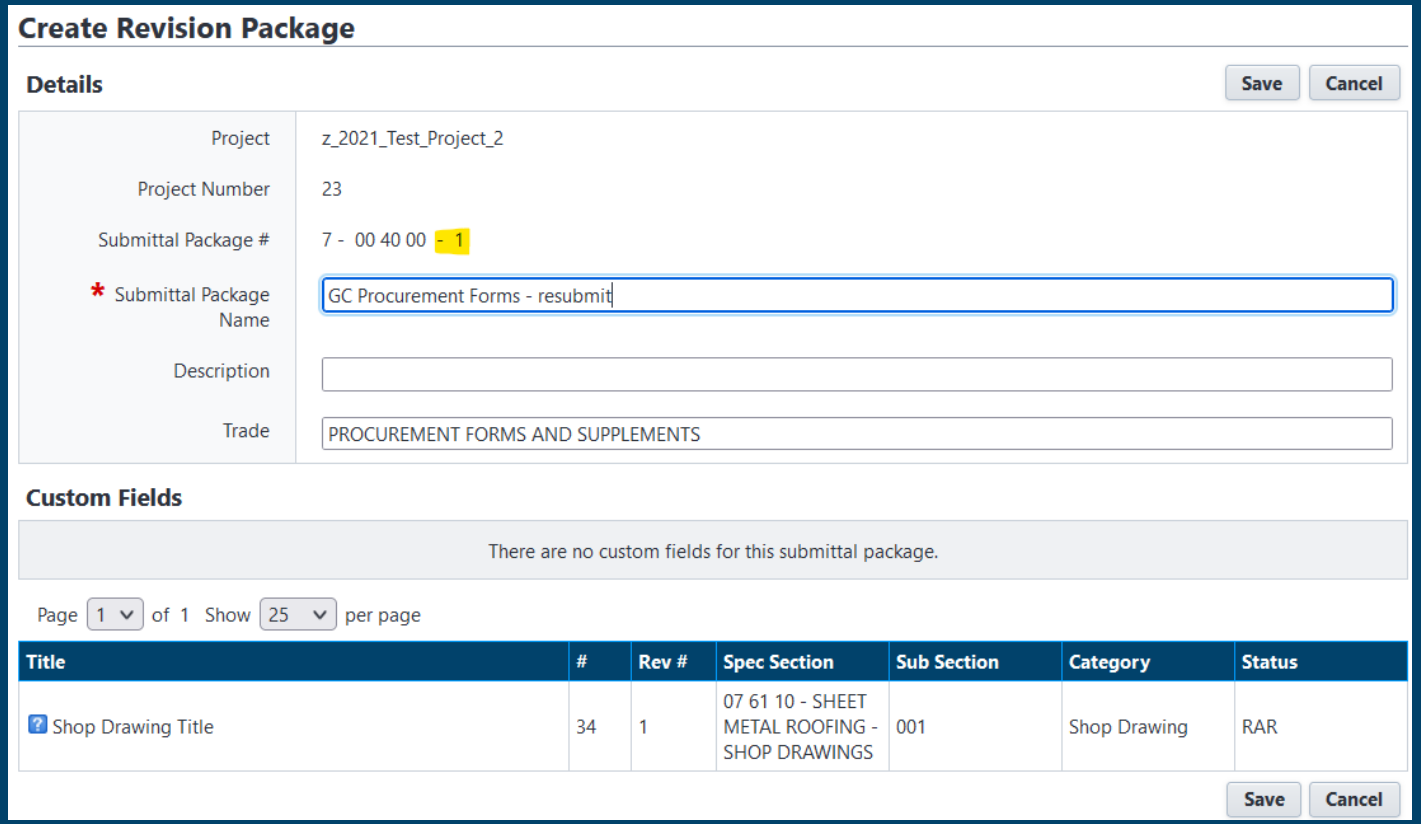
6. Click Create Revision



Submittals – Send for Review – RAR

To create a revision:

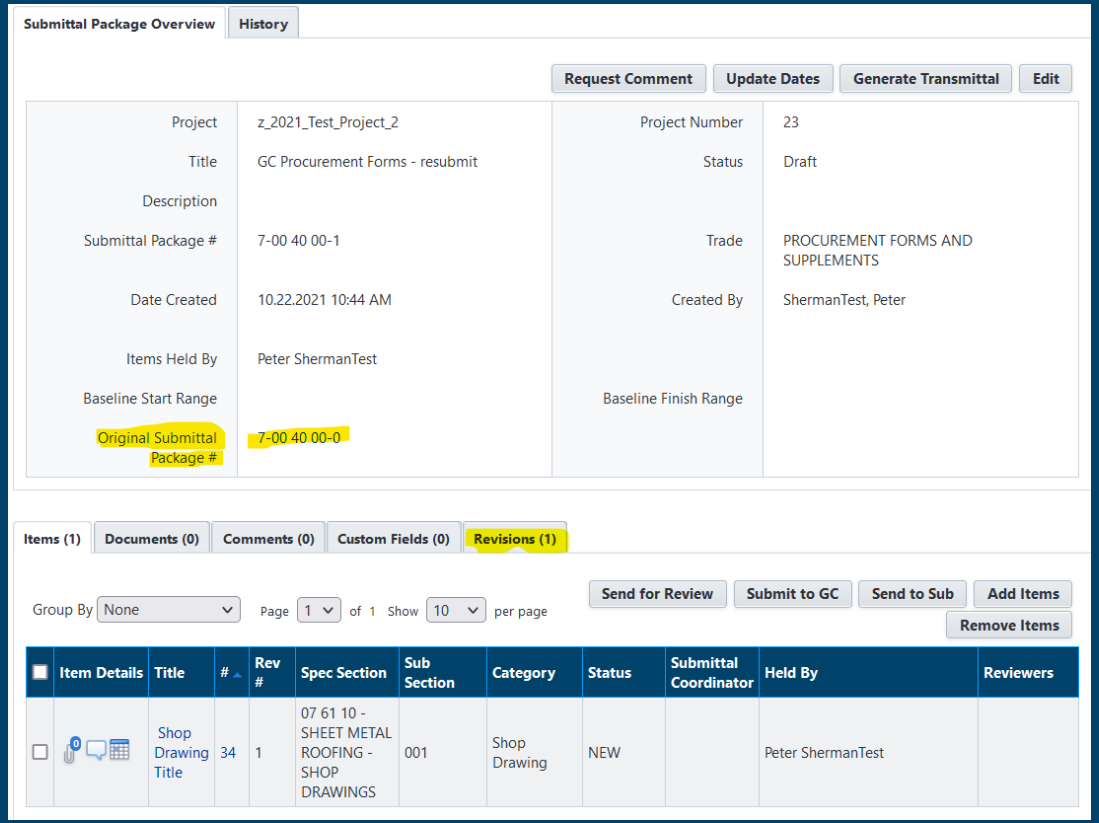
7. A new package will be created with a - 1 added to the package number to indicate it is a revision. I've also added 'resubmit' to the package name here.



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			
Submittal Package #	7-00 40 00-1	Trade	PROCUREMENT FORMS AND SUPPLEMENTS
Date Created	10.22.2021 10:44 AM	Created By	ShermanTest, Peter
Items Held By	Peter ShermanTest		
Baseline Start Range		Baseline Finish Range	
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 | Add Items | Remove Items

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

Submittals – Send for Review – RAR

To create a revision:

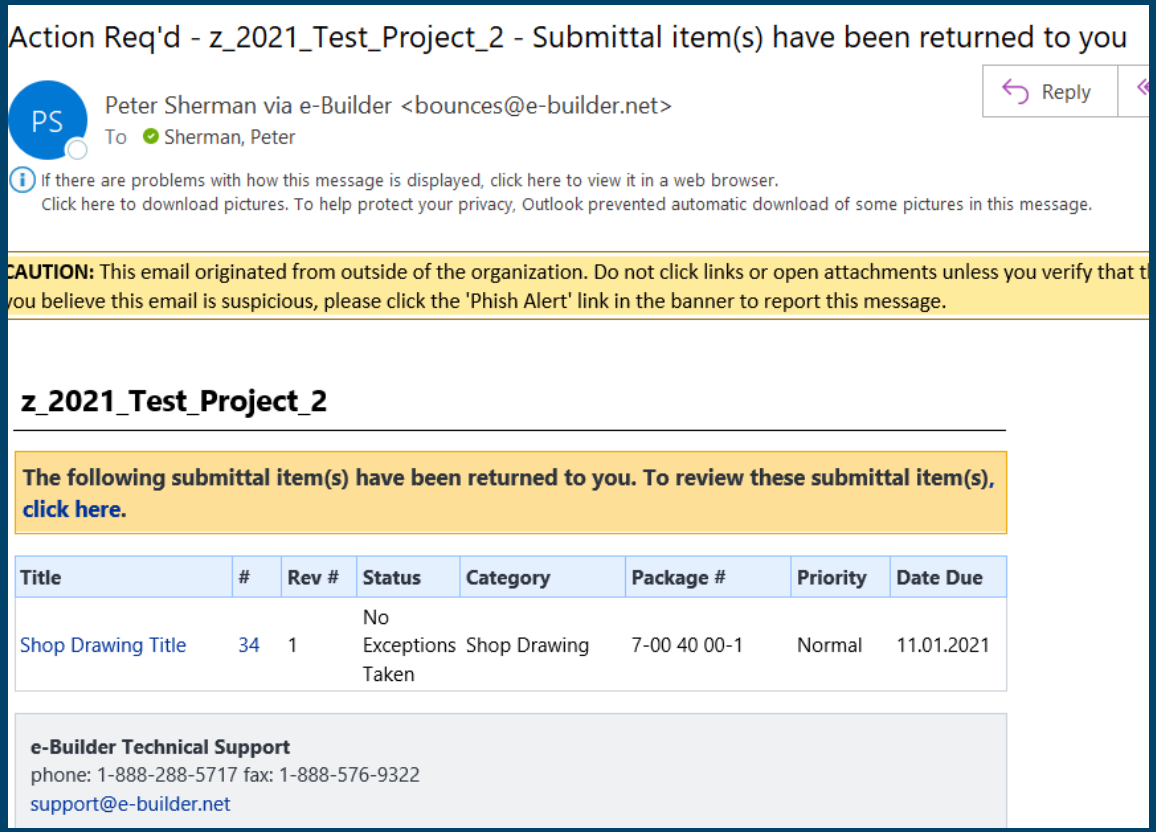
9. The original submittal package is automatically closed when the revision is created:

Create Package | 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

Reply

PS

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 t
you believe this email is suspicious, please click the 'Phish Alert' link in the banner to report this message.

z_2021_Test_Project_2

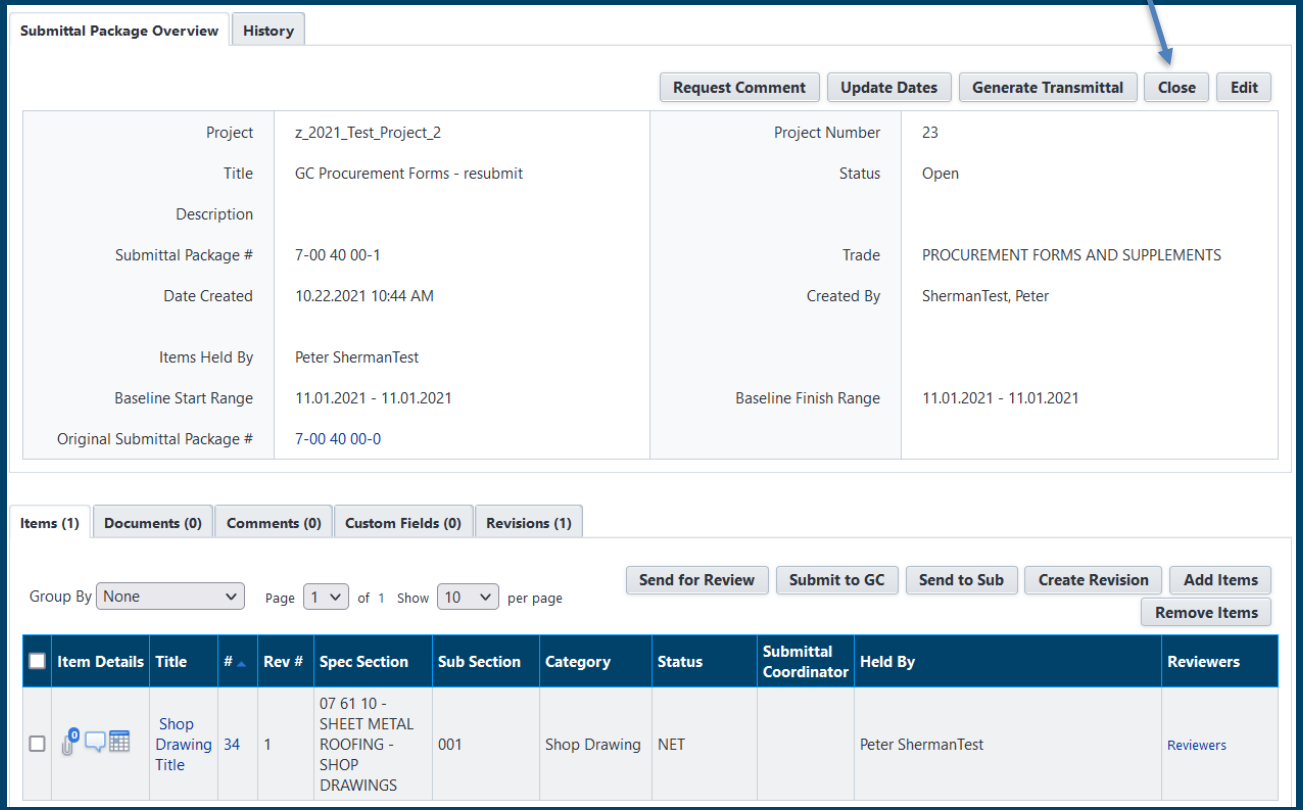
The following submittal item(s) have been returned to you. To review these submittal item(s), click here.

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

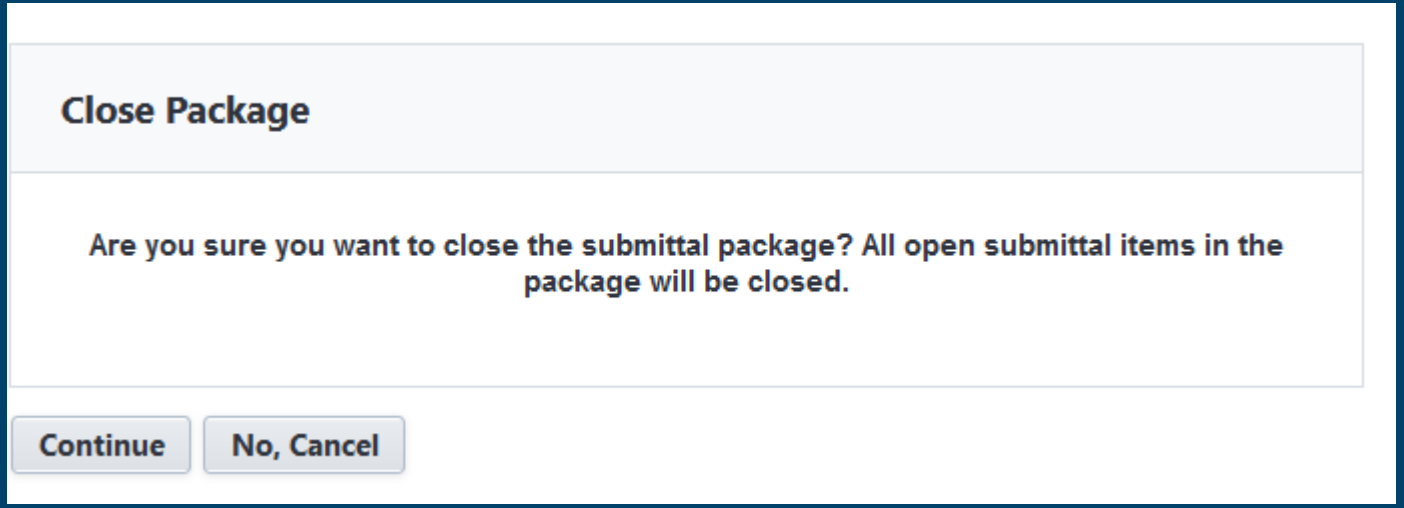
Submittals - Acknowledge

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



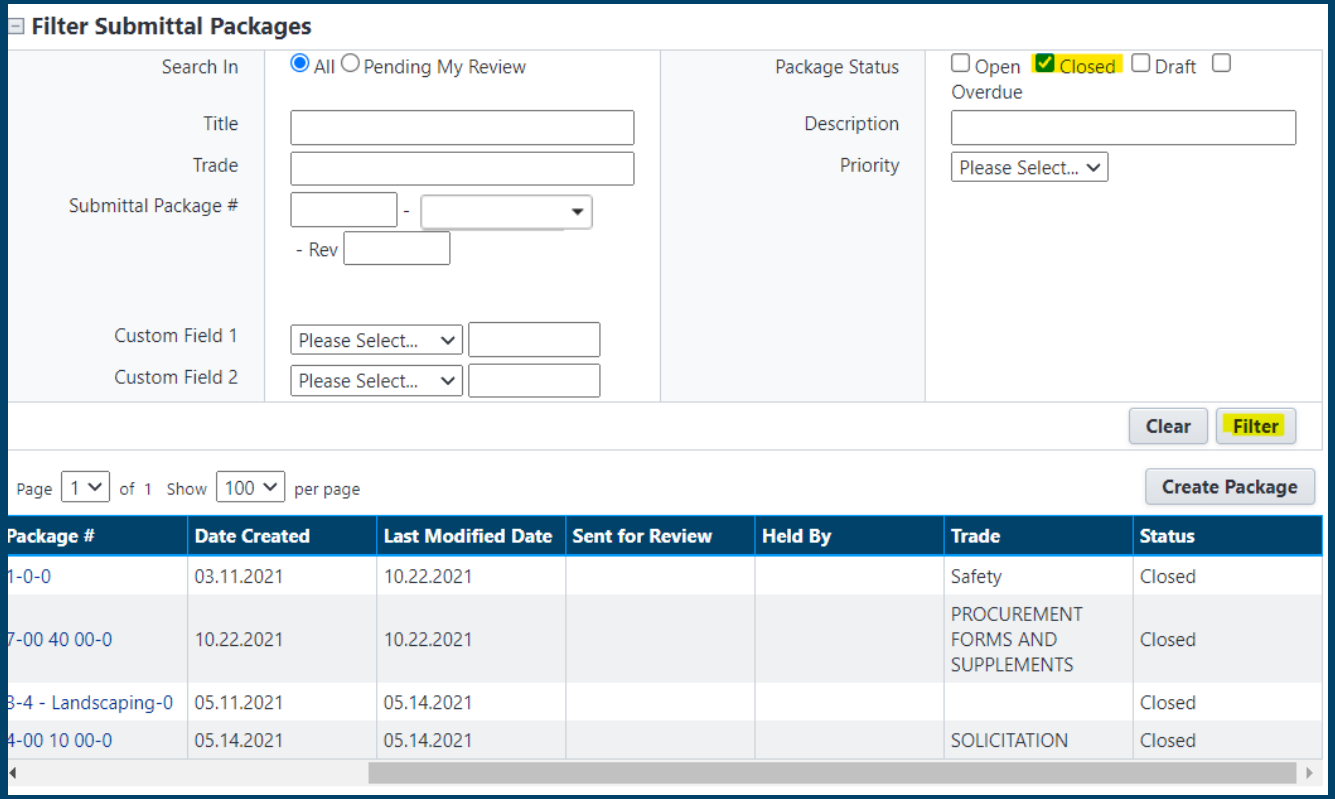
Submittals - Acknowledge

Click Continue



Submittals – View Closed

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



Raleigh

Questions?

peter.sherman@raleighnc.gov