Minnesota State Colleges and Universities

Submittals (SUB)

Contents

Submittals (SUB)

Process to route submittal from Contractor to AE for review.

Start Submittals process (Contractor starts Submittal Process)

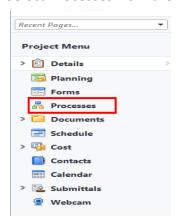1. Click **Projects** from the Top Navigation tabs.

2. Select the Project

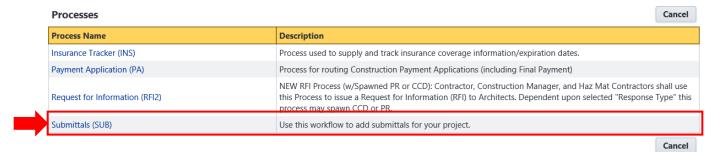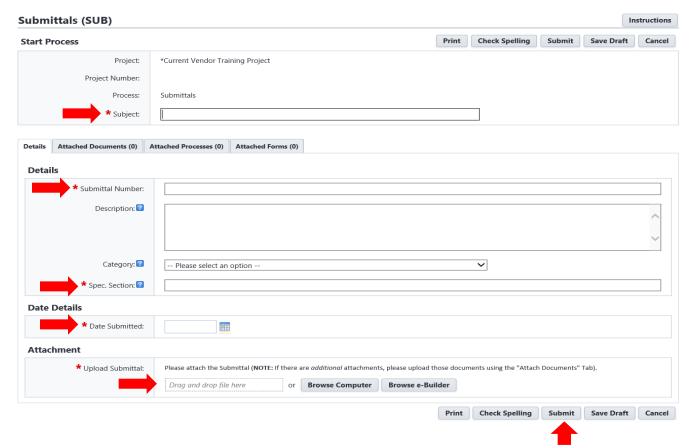3. Select **Processes** from the Project Menu

4. Select **Start Process**

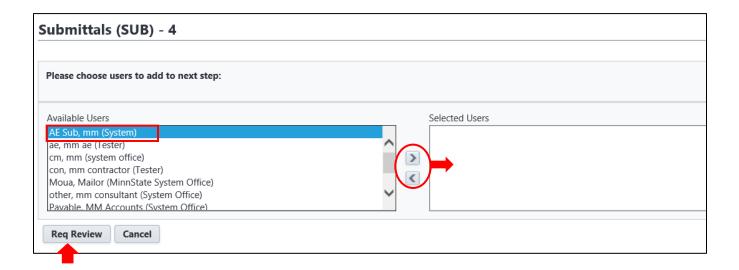5. Select the **Submittal (SUB)** Process from the list.

6. Fill out all the fields on the page.
   a. Enter Subject
   b. Enter Submittal Number
   c. Enter Description
   d. Select Category
   e. Enter Date Submitted
   f. Upload Submittal if more than one document, upload the rest into the Attached Documents tab.

A/E Review (AE)

1. Review all information on the page including documents in the **Attached Documents** tab.
2. Click "**Please select an action**" and select **an action.** Click **Take Action** to move to the next step.
   a. Actions:
      i. **Req Review** – Action to route workflow to AE Sub to review.
         - Choose a user to add to next step.
         - Select User from the **Available Users** box**.**
         - Click the arrow to move user to the **Selected Users** box
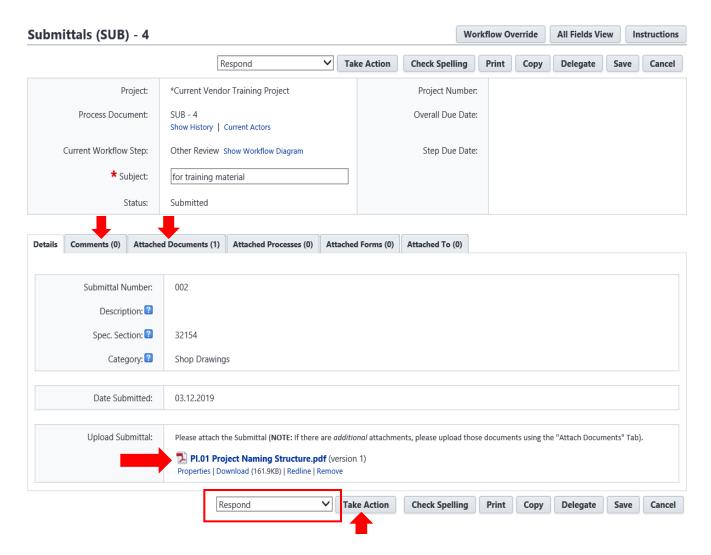   - Click **Req Review**

      ii. **Forward** – If "PM Review Req?" is "Yes" Forward action will route workflow to PM Review.
         If "PM Review Req?" is "No" Forward action will route to Contractor to review and Close
      iii. **Revise** – Action to route workflow back to the initiator to revise.
      iv. **VOID** – Action to void the workflow process
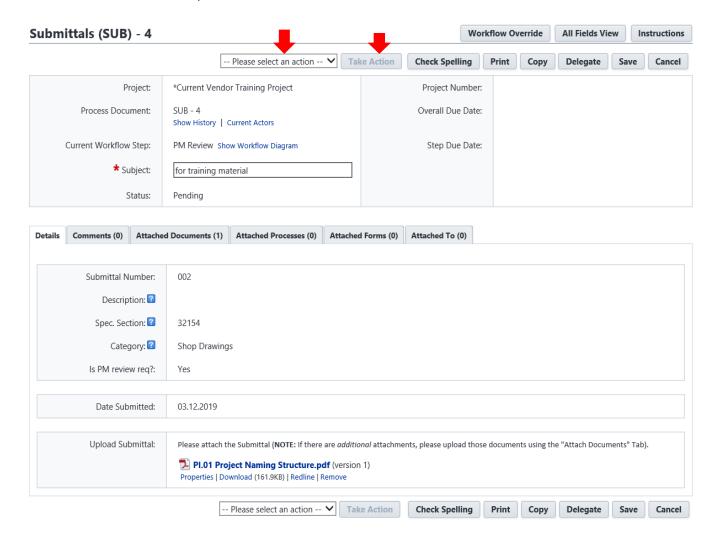
Other Review (AE Sub or Consultant-Other)

AE Sub or Consultant-Other review and comment on the submittal than respond back to the AE.

1. Review all information on the page including documents in the **Attached Documents** tab.
2. Add comment under the **Comments** tab
3. Click **Take Action** on Respond to route it back to the AE.

PM Review (PM)

1. Review all information on the page including documents in the **Attached Documents** tab. Add comments in the **Comment** tab.
2. Select "**Review**" action, Click **Take Action** to route to the AE.

Contractor Notify (Contractor)

1. Contractor review all information on the page including documents under the Attached Documents tab. Review comments under the Comments tab.
2. Click **Take Action** to close the Submittal.